

(Mobile ebook) The IRA Trust: A Simple, Plain English Guide to Turning Inherited Retirement Accounts Into a Financial Dynasty (The Plain English Attorney) (Volume 2)

# The IRA Trust: A Simple, Plain English Guide to Turning Inherited Retirement Accounts Into a Financial Dynasty (The Plain English Attorney) (Volume 2)

*Jeffrey G. Marsocci Esq.*

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THE PLAIN ENGLISH ATTORNEY


## THE IRA TRUST

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A SIMPLE, PLAIN ENGLISH GUIDE TO  
TURNING INHERITED RETIREMENT  
ACCOUNTS INTO A FINANCIAL DYNASTY

by Jeffrey G. Marsocci, Esq.



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**Jeffrey G. Marsocci Esq. : The IRA Trust: A Simple, Plain English Guide to Turning Inherited Retirement Accounts Into a Financial Dynasty (The Plain English Attorney) (Volume 2)** before purchasing it in order to gage whether or not it would be worth my time, and all praised The IRA Trust: A Simple, Plain English Guide to Turning Inherited Retirement Accounts Into a Financial Dynasty (The Plain English Attorney) (Volume 2):

0 of 0 people found the following review helpful. The good news is that it is cheap. By Nana in Florida. Although this 44 page book purports to be about IRA trusts, the first 24 pages provide an elementary summary of what an IRA is, what are Required Minimum Distributions, what is the difference between a traditional IRA and a Roth IRA, etc. Arguably, anyone sophisticated enough to want to research IRA trusts is probably well beyond this elementary information. Although there is little problem with a review, this is about one-half of the book. Page 14 refers to the 15% penalty for cashing out an IRA early. As everyone knows, the penalty is 10% and not 15%--this appears to be a mistake. As for the central section about IRA trusts that begins on page 25 and ends on page 44--most of this is readily available on the web. I learned a little about the tax implications of distributions in the context of a complex trust, as opposed to a simple conduit trust. So, I gave this a 2. I was hoping it would do more than it did. The pages are about 8.5 x 5.5 inches in this very brief paperback. The good news is that it is cheap. If you are beginning your research, this would be okay. If you have spent 5 hours reading what you could find on the web and wanted a more detailed summary--this is not likely to meet your needs, unfortunately.

**TAXES ARE OUT OF CONTROL.** But the tax code provides tremendous **LOOPHOLES** you can use to grow your assets into a **FAMILY A FORTUNE**. Proper trust planning around retirement accounts can provide your loved ones with **MULTI-GENERATIONAL WEALTH** but only if you plan ahead, use the **RIGHT DOCUMENTS** and work with the **RIGHT PROFESSIONALS**. What You'll Learn-- \* How tax loopholes around inherited retirement accounts can avoid unnecessary taxes. \* How proven financial techniques can grow inherited assets exponentially. \* How the right kind of trust can protect this inheritance from creditors, divorces, lawsuits, and a Medicaid spend down as well as bad spending habits ... and much, much more explained in Plain English.

**About the Author** Jeffrey G. Marsocci was born in Fort Worth, Texas, and raised in Lincoln, Rhode Island, where he graduated from Mount Saint Charles Academy High School. He received his Bachelors degree in Business from Hofstra University, and two years later earned his law degree from the same university. In 2004, he received a Certificate Degree in Non-Profit Management from Duke University, and has earned his Legal Master of Estate Preservation designation from the Abts Institute for Estate Preservation. Jeff also served as a member of the Legal Council for The Estate Planning Source, LLC, a nationally recognized estate preservation company formed by the protgs of the late Henry W. Abts III, trust guru and author of The Living Trust. Mr. Marsocci has led his own firm in Raleigh, North Carolina, since 1996, focusing on the areas of Trusts and Estate Planning with a concentration on helping his clients plan ahead to avoid problems rather than clean them up afterwards. He also frequently participates in national and regional programs to educate attorneys, financial advisors and accountants on estate planning issues. Jeff and his wife Kathleen work with the college-based service organization Circle K at North Carolina State University. Jeff and Kathy also each received the Presidents Call to Service Award for performing more than 4,000 hours of service during their lifetimes.