Common IRA Questions Answered for Retirees

We put together this recorded presentation in lieu of the in-person events, which were canceled earlier this month. Our hope is that people continue to think about the big picture and engage us with questions pertaining to their most exciting and uplifting financial goals.

Particularly in times such as these, we know that clients and followers are looking for guidance. Evergreen Gavekal aims to be a partner for you in the strategic management of your financial life. Making recommendations for your asset allocation, helping you find ways to be more tax-efficient, and encouraging you to continue planning for the future are our goals. What are yours?

This informative session is a must-listen for owners of IRAs who are heading into retirement. Jeff Otis, Senior Wealth Consultant & Partner, and Katie Vercio, Senior Financial Planner, CFP and CDFA, will discuss topics related to required minimum distributions, implications of the recent SECURE Act, Roth IRA conversions, and estate planning considerations.

Recorded on March 23, 2020