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Executive Summary: Asset Protection for Inherited IRAsAppendix A; Table I; Table II; Appendix B; IRA Trust Checklist; Letter Ruling 200809042; Letter Ruling 201128036; Revenue Ruling 2006-26; Sample IRA Designation of Beneficiary Form for Single IRA Trust; Sample IRA Designation of Beneficiary Form for Multiple IRA Trusts; Don't Be Blind-Sided by Default IRA Beneficiary Forms; Letter Ruling 199936052; Power of Attorney Issues

Sommario/riassunto

This essential guide outlines many of the mistakes that are made by IRA account holders from an IRS compliance point of view, understanding that it is quite easy for a taxpayer who has an IRA or inherits an IRA to fall into a tax trap and violate the IRA rules. The IRA Guide to IRS Compliance Issues will help you be aware of the potential IRA violations that may be triggered and how to be proactive and not reactive when it comes to IRA issues.