

September 2023

Hello Joe,

This month, our newsletter explores the following topics:

- [Retirement's longer lifespans and changing needs](#)
- [The ten-year rule for inherited IRAs](#)
- [Big retirement account changes you haven't heard about](#)
- [Getting student loan forgiveness despite Supreme Court ruling](#)

Fall reminds us that year-end is not that far off. Please contact us if you'd like to get a head start on preparations to make 2024 a successful year for you.

Sincerely,

Jeff Howard, ChFC®, RICP®, CExP



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The Future Of Retirement: Longer Lifespans And Changing Needs

Many disruptive factors will impact retirement in the future. Thus, the time for workers to start preparing to deal with these disruptive factors is now. Here are some potential solutions to help in that process.

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IRS 10-Year Rule For Inherited IRAs: Kiplinger Tax Letter

The SECURE Act, which was passed in 2019, made some significant changes to the rules for inherited IRAs, including the 10-year rule. What is it, and what are the exceptions to it?

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3 Big Retirement Account Changes You Haven't Heard About

Congress passed a slew of new retirement account changes recently. And three of them are worth singling out for how they may be able to help your wallet.

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3 Ways You Can Still Get Student Loan Forgiveness Despite The Supreme Court Ruling

Borrowers disappointed by the failure of student loan forgiveness at the Supreme Court should check if they qualify for existing relief measures, experts say.

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