Distribution Options for Retirement Plans

Overview/ Description:

When one retires or leaves a job questions usually arise around the retirement plan. Two of the biggest concerns are: “What do I do with my retirement plan after I retire?” and, “What are my options for taking distributions?” This webinar will provide guidance on distribution options from qualified plans for the pre-retirement job changer, divorced individuals, retirees, and beneficiaries.

Workshop Objectives:

At the end of this workshop you will:

- Know the types of plans distributions apply to
- Retirees will understand their distribution options
- Beneficiaries, including spouses, will understand their options for distributions
- Divorced individuals will learn how they can access funds through a QDRO
- Understand tax implications of distributions, including penalties
- Know something of retirement roll-overs and trustee-to-trustee account transfers
- Know when you must take distributions

TARGET AUDIENCE:

ANYONE APPROACHING RETIREMENT AGE OR CHANGING JOBS AND THOSE WHO MAY INHERIT A QUALIFIED ACCOUNT SUCH AS A 401(K), 403(B), 457, TSP OR AN IRA

EXPECTED DURATION:

45–60 MINUTES

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