The SECURE Act & Options for Your Retirement Accounts

Keep informed of new laws, concepts and strategies!

Setting **E**very **C**ommunity **U**p for **R**etirement **E**nhancement, known as the **SECURE ACT**

Was passed on December 20, 2019, when it was signed into law by President Trump. It went into effect January 1 this year.

What does this mean for you?

Topics...

- How does the Secure Act affect me and my retirement plan?
- Does the Secure Act affect the estate plan I have in place?
- What are some options for my Required Minimum Distributions?
- Should I consider a converting my IRA to a ROTH IRA?
- How can I get a tax break for charitable contributions if I don't itemize?
- What are some wealth transfer strategies to consider?

You're Invited...

WHEN: **Thursday, March 5, 2020**
9:00 AM – 11:00 AM

WHERE: **HAMPTON INN**
8811 Plum Drive
Urbandale, IA 50323

RSVP: **(515) 309-2985**

Vicki L. Monaco is an investment advisor representative with over 25 years in the financial services industry. Ms. Monaco offers comprehensive wealth management services and specializes in pre and post retirement planning.

Life & Legacy
ADVISORS

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