



covid conversion

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Unfortunately, the current health and economic crises have significantly and negatively affected asset values. However, these depressed asset values create significant planning opportunities to consider. One is the conversion of a traditional IRA into a Roth IRA.

Many investors often consider converting their traditional IRA into a Roth IRA as part of their overall retirement planning. Investments in a Roth IRA have the potential to not only grow tax-free (in the same manner as a traditional IRA), but also do not have required minimum distributions during the lifetime of the original owner and his or her spouse. In addition, distributions from a Roth IRA may be tax-free if all applicable distribution requirements are met.

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