



## See-Through Trust for IRA Beneficiary(s)

In the video entitled “See-Through Trust for IRA Beneficiary(s)” Hans and Tom discuss this view of estate planning.

**SEE-THROUGH TRUST FOR IRA BENEFICIARY(S)**

<b>S.S.</b> <input type="checkbox"/>	<b>ADVANTAGES</b> <ul style="list-style-type: none"><li>1.) POST DEATH CONTROL</li><li>2.) PROTECTION (CREDITORS OR MISMANAGEMENT)</li><li>3.) SPECIAL NEEDS PLANNING</li></ul>	<b>DISADVANTAGES</b> <ul style="list-style-type: none"><li>1.) COMPLEXITY + COST</li><li>2.) TAX IMPLICATIONS</li><li>3.) BENEFICIARIES MUST QUALIFY AS EDB'S</li></ul>	<b>INCOME</b> <input type="checkbox"/>
<b>MED</b> <input type="checkbox"/>	<b>SEE-THROUGH TRUST REQUIREMENTS</b> <ul style="list-style-type: none"><li>1.) VALIDITY UNDER STATE LAW</li><li>2.) IRREVOCABLE</li><li>3.) IDENTIFIABLE BENEFICIARIES</li><li>4.) DOCUMENTATION TO CUSTODIAN BY 10/31 FOLLOWING IRA OWNERS DEATH</li></ul>	<ul style="list-style-type: none"><li>1.) CONSULT WITH PROFESSIONALS (ATTORNEY + IRA EXPERT)</li><li>2.) REVIEW REGULARLY</li><li>3.) CONSIDER TAX IMPLICATIONS REGULARLY</li></ul>	<b>ESTATE</b> <input type="checkbox"/>
<b>LTC</b> <input type="checkbox"/>			<b>TAXES</b> <input type="checkbox"/>
<b>401K/IRA</b> <input type="checkbox"/>			

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