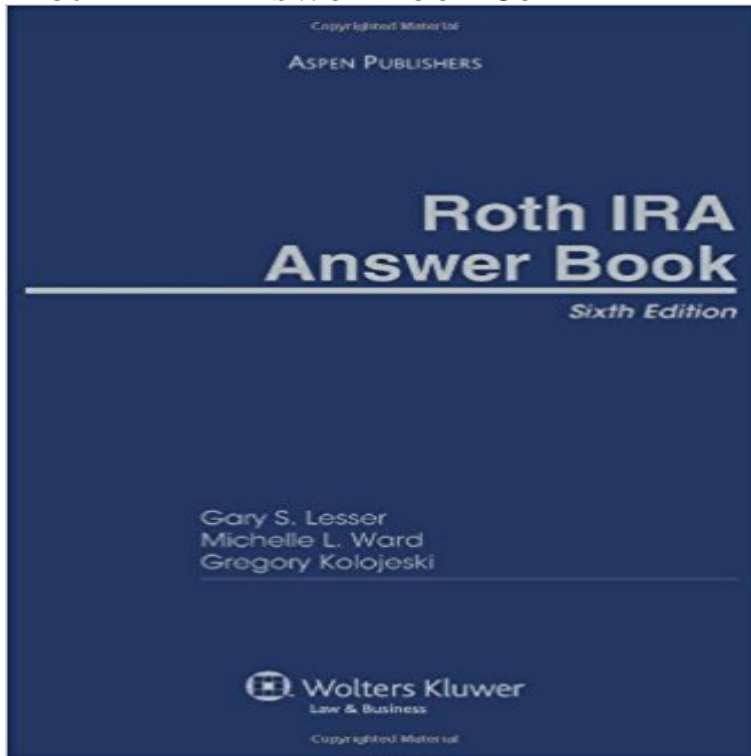


Roth IRA Answer Book 6e



Roth IRA Answer Book, Sixth Edition, provides an up-to-the-minute tutorial on this subject for a wide variety of professional markets, including pension consultants, insurance agents, financial planners and investment advisors, plan administrators, lawyers, and accountants, as well as businesses that promote, market, service, or provide technical support to retirement plans, products, and related services. You'll find in-depth coverage of the administration and operation of a Roth IRA, as mandated by the Internal Revenue Code, Treasury regulations, and other IRS guidance. Written by a team of practicing experts preeminent in their fields, Roth IRA Answer Book takes the reader, step by step, through the creation, operation, and extinction of a Roth IRA. Topics covered include the following: How a Roth IRA is established, how documents are designated, and how a Roth IRA may be revoked Trustee and custodian disclosure requirements and governmental form reporting requirements - Forms 1099-R, 5329, and 8606 Limits on contributions, including the contribution phase-out rules, and the definition of modified adjusted gross income (MAGI) How the taxation of a Roth IRA distribution depends upon the source of funding for the amount distributed How abusive transactions having the effect of shifting value from a preexisting business into a Roth IRA for less than fair market value may be challenged How the contribution recovery rules under the ordering rules determine whether a Roth IRA distribution consists of annual contributions, conversions from an eligible retirement plan, other rollover contributions, or earnings How to make and treat a rollover (conversion) from an eligible retirement plan to a Roth IRA Which taxpayers will benefit most from a conversion, and when (especially in a declining investment environment) can a conversion be undone in a

recharacterization How a 2010 conversion is spread out over two years, but accelerated into income if received before 2013 How the elimination of the \$100,000 MAGI requirement and, if married, the joint filing requirement for rollover conversions to Roth IRAs will accelerate conversions after 2009 Income and estate tax benefits of establishing a Roth IRA, and of converting a traditional IRA to a Roth IRA How Roth IRAs may be used to enhance overall wealth-transfer planning The treatment of penalty-free distributions from an eligible retirement plan for special purposes, such as hurricane distributions, qualified recovery assistance distributions, qualified disaster recovery distributions, and qualified reservist distributions How the suspension of the 2009 RMD rules affect Roth IRA owners and beneficiaries How and when special-purpose distributions may be repaid (rolled over) to an eligible retirement plan, including a Roth IRA And more! The Sixth Edition includes coverage of the most recent developments in the area, including:

A fully revised chapter 3 on conversions, contribution recharacterization, and rollovers, and chapter 4 on voluntary distributions Expanded coverage and more examples of the distribution ordering rules Why a Roth IRA conversion after 2009 may or may not make sense How the removal of the \$100,000 modified adjusted gross income (MAGI) limit for Roth conversions from an eligible retirement plan beginning after 2009 will effectively eliminate the income limit for contributing to a Roth IRA Expanded coverage of special purposes distributions and repayments, including qualified recovery assistance distributions and qualified disaster recovery distributions An examination of the circumstances that allow special-purpose distributions to be recontributed (i.e., repaid by being rolled over) to an eligible retirement plan, including a Roth IRA Expanded coverage of the rollover rules applicable to certain airline payments, military death gratuities, Exxon Valdez settlements, and

Servicemembers Group Life Insurance (SGLI) to a Roth IRA. Expanded coverage of the qualified rollover rules that allow a direct conversion from an eligible retirement plan to a Roth IRA. How same-sex marriages, civil unions, domestic partnerships, and similar relationships in California, Connecticut, Hawaii, Maine, Massachusetts, New Hampshire, New Jersey, Oregon, Vermont, Washington, and the District of Columbia can affect an owners or participants beneficiary designation.

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