Need InspIRAtion for Educating Clients on RMDs?

Discussing Required Minimum Distributions (RMDs) with your clients can help them make informed decisions about retirement income and taxes. To support these important conversations, we've created a collection of educational resources.

This value-add content includes:

- General information about RMDs, such as what they are and when they're required.
- A financial calculator to help you and your clients estimate future RMDs.
- A complete seminar, "The Life of Your IRA," which covers RMDs and other key topics for clients and prospects.

We hope this toolkit provides the inspiration and resources you need to have meaningful and productive discussions about RMDs with your clients.

[Read the Client Guide]

Related Value-Add Marketing Resources

Your Guide to Required Minimum Distributions

A brochure for your clients on RMD guidelines and requirements.

Download the Presentation >

Seminar – The Life of Your IRA

A seminar you can present to clients about the different stages of an IRA, including withdrawals during retirement and beyond.

Download the Sales Idea >

What are my projected required minimum distributions?

You or your clients can use this calculator to create an estimated projection of required future withdrawals.

Calculate Your RMDs >

Shareable Content

Share *When do I take a Required Minimum Distribution?* with your clients.

Email Your Clients

Related Resources

- Need InspIRAtion for Educating Clients on IRAs?
- Helping Your Clients with Their Retirement Accounts
- More Value Add Resources

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