

IRA TOOLS AND RESOURCES

Ed Slott's "**7 Questions to Ask Your Current IRA Advisor**" may help you see how he or she measures up:

1. What resources or publications do you use to keep up to date with changing IRA distribution rules?
2. What is the last new IRA ruling or tax law change for which you are aware?
3. Who should I name as my IRA beneficiary?
4. How do you keep track of IRA beneficiary forms?
5. Can you show me the IRS life expectancy tables you use to calculate required IRA distribution for both IRA owners and beneficiaries?
6. What will happen to my IRA after my death?
7. Who do you call when you have questions about IRA distributions?



Kelly Monroe is a member of Ed Slott's Master Elite IRA Advisor Group and specializes in Individual Retirement Arrangements (IRA) issues. Kelly personally studies the complex area of effectively managing the distribution of assets from IRAs with Ed Slott, a nationally known CPA. She is prepared with knowledge, tools and programs that take clients through a diagnostic checklist to help ensure that their IRAs are set up correctly.



Request Ed Slott's "Complete IRA Care Solution[™]" that will take you through a diagnostic checklist to help ensure that your IRAs and retirement accounts are set up correctly.

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