

Explore our educational brochure library for tax-advantaged accounts

Empower your account holders with the valuable insights found in our educational brochure library. These brochures save your staff time by efficiently delivering the knowledge and tools your account holders need to achieve their financial goals. Strengthen your financial partnership by supporting your customers' path to a prosperous future.



Visit our website to view samples of all our [educational brochures](#).



Tax benefits of owning an IRA

Educate your account holders on how traditional individual retirement accounts (IRAs) and Roth IRAs can provide significant tax advantages as part of a comprehensive financial plan.



Retirement and education savings accounts

Equip your account holders with answers to frequently asked questions about traditional IRAs, Roth IRAs, and Coverdell Education Savings Accounts (CESAs).



Which IRA is right for you?

Provide your account holders with a clear overview of traditional and Roth IRAs, including the tax implications associated with each.



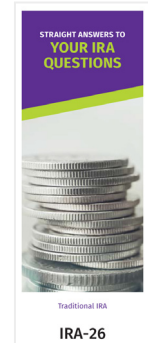
Understanding your IRA plan establishment documents

Familiarize your account holders with the key forms and documents used to open, maintain, and manage IRAs, simplifying the account management process.



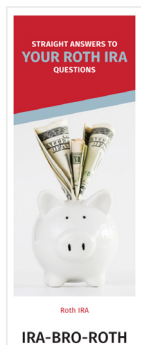
The SECURE 2.0 Act and your IRA

Keep your account holders up to date on the latest legislative changes impacting IRAs, effective from 2023 and beyond, including new compliance requirements and opportunities.



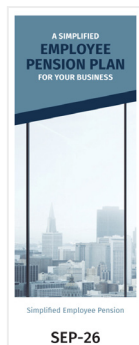
Straight answers to your IRA questions

Equip your account holders with detailed information on the features and tax benefits of traditional IRAs to support their retirement planning decisions.



Straight answers to your Roth IRA questions

Highlight the unique advantages of Roth IRAs, including tax-free growth and withdrawals, to help account holders decide if this option fits their financial strategy.



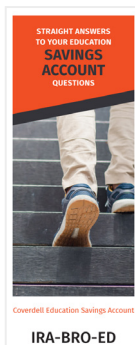
A SEP plan for your business

Offer insights to employers and account holders about the tax benefits and flexibility of Simplified Employee Pension (SEP) plans as a retirement savings option.



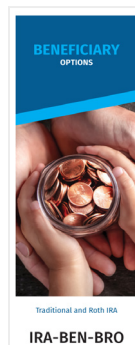
Straight answers to your HSA questions

Provide insights into the tax benefits of Health Savings Accounts (HSAs) and their dual purpose as a tool for medical expenses and long-term savings.



Straight answers to your CESA questions

Help your account holders understand how CESAs can be used to save for qualified education expenses while benefiting from tax advantages.



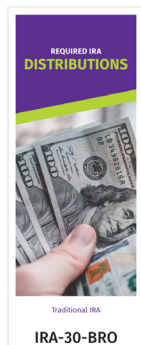
Beneficiary options

Educate account holders on their choices as IRA beneficiaries, including updates from the SECURE Act and SECURE 2.0 Act.



IRA distributions

Help account holders understand the rules for IRA distributions and making informed decisions about withdrawals.



Required IRA distributions

Educate your account holders about RMD requirements, including how to estimate and plan for their distributions to stay compliant and optimize retirement income.



Moving assets between retirement plans

Offer information to account holders on transferring assets between retirement plans while preserving tax benefits and avoiding common pitfalls.



Convert to a Roth IRA

Provide clarity on IRA conversions, including the potential tax implications and strategic benefits for long-term financial planning.



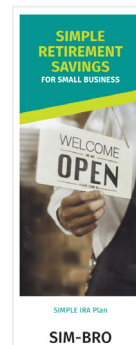
IRA-to-IRA rollovers (and the transfer alternative)

Educate your account holders about the process of IRA rollovers and transfers while preserving the tax-advantaged status of their funds.



Roll your retirement plan into an IRA

Help your account holders understand the federal tax rules surrounding direct and indirect rollovers from employer-sponsored retirement plans to traditional IRAs, empowering them to make informed decisions.



Simple retirement savings for small business

Keep your account holders informed about recent updates to Savings Incentive Match Plan for Employees (SIMPLE) IRA plans under the SECURE 2.0 Act, including new contribution options and employer benefits.

Disclaimer

These brochures are designed to educate account holders with general information on federal tax laws applicable to various retirement and savings accounts to help them make their own decisions. They do not provide personalized recommendations, legal, or tax advice, nor do they explain how these rules may apply to individual circumstances. Financial institutions are encouraged to advise account holders to consult a tax or legal professional for specific guidance.