This year has brought several interesting changes and important proposals that can affect many estate plans. We have held seminars covering two major issues:

1. the IRS Proposed Regulations affecting qualified retirement plans and IRAs; and

2. the Administration’s proposed changes to the Federal Estate and Gift Taxes.

If you did not attend these seminars, you may access and watch them through the links below.

**The IRS’ Proposed Regulations: Mandatory Distributions from IRAs and Retirement Accounts**

Earlier this year, I hosted a seminar on the Internal Revenue Service’s (IRS) proposed regulations that clarify and revise some of the required minimum
distribution (RMD) rules for qualified plans (i.e., 401ks, 403bs, etc.) and individual retirement accounts (IRAs). The proposed regulations contain potential changes for both spouse and non-spouse beneficiaries.

This seminar may be accessed and viewed through THIS LINK.

The Administration’s Proposed Changes to the Federal Estate and Gift Taxes

In March 2022, the Administration proposed significant changes to the federal estate and gift taxes, as well as changes to the basis carry-over and basis step-up rules. These changes would have a substantial impact on many estates.

You can access and watch this seminar through THIS LINK.

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