NJ.com Quotes Samantha Rocco in “How should payouts be made from an inherited IRA that’s in a trust?”

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The rules regarding when assets in an IRA must be withdrawn following death can be complicated and changed significantly with the passing of the SECURE Act in 2020.

Samantha Rocco, a member of the firm’s Taxation and Wills, Trusts & Estates groups, provided key insights to handling IRAs after a family member’s passing in articles published by NJ.com and NJMoneyHelp.com. She discussed the variables that determine how the money should be handled, what happens when a trust is named as the IRA beneficiary, and the procedural differences between conduit trusts and accumulation trusts.

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