

Are your Clients Worried about the loss of their STRETCH IRA?



Introduce Them to the STRETCH IRA PROTECTION TRUST

The Secure Act 2.0



Advisor Advantages:

- ✓ **Increase assets under your management**
- ✓ Assets grow tax-free within the Trust
- ✓ Documents drafted FREE for review
- ✓ Professional support for SIP Trust establishment
- ✓ Free resources and marketing materials

Client Benefits:

- ✓ Secure lifetime income (restore the STRETCH)
- ✓ Fixed or variable payments to beneficiaries
- ✓ Provide for and protect the beneficiaries
- ✓ Asset protection for beneficiaries
- ✓ The remainder impacts those in need in the client's community



Now using the SIP Trust, your client can recover the stretch feature for their beneficiaries, and

**YOU CONTINUE TO MANAGE THE ASSETS
Through the Next Generation.**

INTRODUCING:

The Stretch IRA Protection Trust (SIP TRUST)

Benefits include:

- Client continues to use their IRA during their lifetime.
- **You continue to manage the assets now and through the next generation.**
- **Allows for continued tax-free growth inside the Trust.**
- Spread the income payments over the lifetime of the beneficiaries.
- Fund the SIP Trust with all or some of the IRA assets.

To find out more, contact us at:



Strength & Stability
since 1865