

SECURE Act = SALES Opportunities

Paula Calimafde presented at The Edge 2020, a life insurance summit for top insurance professionals presented by National Life Group on February 19, 2020.

The presentation provided an overview of the SECURE Act, signed into law on December 20, 2019. Paula reviewed significant changes made by the law to retirement plans, with a special emphasis on the elimination of the stretch IRA. Changes in estate planning documents that may be required and possible ways to reduce the loss in the value of retirement benefits for children and/or grandchildren were also discussed.

Paula chairs the firm's Retirement Plans, Employee Benefits and Government Relations practice groups and is also a senior member of the Estate Planning, Tax and Nonprofit groups.