

***TheTaxReview* Senior Tax Planning**

Learning Objectives/Table of Contents

Chapter

1 Retirement Planning

1-A Choose the most appropriate retirement plan for a taxpayer.

1-B Apply tax law to investments in traditional IRAs and Roth IRAs.

1-C Recognize the benefits and risks of using life insurance for retirement planning.

2 Planning Ahead

2-A Identify the consequences of dying intestate.

2-B Recognize the factors involved in planning for incapacity.

2-C Select alternatives which allow a client to avoid probate.