

Minimize the impact of RMDs

Take required minimum distributions (RMDs) but still leave something behind

Whether you're ready for retirement income or not, IRS rules require that you start drawing your savings from certain types of accounts at RMD age.

In essence, the tax deferrals afforded to some retirement plans don't last forever¹. Of course, navigating these rules can get a little complicated. In fact, it can potentially be a real puzzle.

But help is available.

Don't let RMDs tarnish your legacy

What if you could meet your RMD obligations while protecting your legacy?

It's possible with a fixed index annuity from North American. The idea is to take out just the income you have to take, allowing the balance to grow to help maximize what's left for the next generation.

Get premium protection, guaranteed growth, and the potential for some additional accumulation, based on how indexes tied to market performance do.

The situation

You have no interest in taking RMDs. That money was supposed to be for your grandkids. But since you have no choice, you want to preserve as much of your legacy as possible.

Ask your financial professional about...

Using the legacy benefits available within an annuity to help maximize what's left to your heirs while meeting your RMD obligations.

Ready to put the pieces together?
Call your financial professional today!

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