

[888.990.7892](tel:888.990.7892)



WHAT'S YOUR **RMD** NUMBER?

Hello [Customer's Name],

Required Minimum Distributions (RMDs) are required by the IRS once you reach a certain age. Do you know **if** or **when** you have to take an annual RMD? With all the recent changes from the Secure Act 2.0, it can get confusing. Take a look at the chart below to find out at what age you should begin taking RMDs. Failure to take your RMD has significant tax consequences; up to a 50% excise tax on the amount that should have been distributed. It's worth taking note of, even if you are not of RMD age yet, so you are prepared to take your distributions when the time comes.

Required Minimum Distribution Age	
On or before 6/30/1949	70½
7/1/1949 - 12/31/1950	72
1/1/1951 - 12/31/1959	73
On or after 1/1/1960	75

Want to learn more? A podcast episode of **PTC Point of View**, titled "[How to Navigate Required Minimum Distributions \(RMDs\)](#)" is available to listen to. It addresses some frequently asked questions regarding required minimum distributions (RMDs).

How to Navigate Required Minimum Distributions (RMDs)
This bonus episode goes over how to navigate Required Minimum Distributions (RMDs) from your Retirement Account. Chris Trembly, Director of Operations at Preferred Trust Company...

Dec 2022 · 17 min 20 sec

Important RMD Reminders:

Be Sure to Consult a Tax Professional about your RMDs. Preferred Trust Company is NOT licensed to provide any tax advice. If you have questions or concerns about your RMD, please consult a tax professional.



Should you have any questions, need assistance, or simply want to learn more about Self-Directed IRAs, please don't hesitate to reach out to our Preferred Trust team.

We're here to support and empower you as you grow your wealth through alternative investing, and we look forward to working together.

Have questions or need help?

Our Preferred Trust team is here for you!

Call or email us at [888.990.7892](tel:888.990.7892) option 2 or clientservice@ptcemail.com.

www.PreferredTrustCompany.com

PREFERRED TRUST COMPANY, LLC ("Preferred Trust") | 6700 Via Austi Parkway | Suite 301 | Las Vegas, NV 89119 | 888.990.7892 | www.preferredtrustcompany.com | Financial Institutions Division of Nevada License No. TR10025. Preferred Trust performs duties of a custodian and as such, does not sell investments or provide investment, tax, or legal advice. Preferred Trust is committed to safeguarding all non-public personal information provided to us by our customers. Preferred Trust collects, retains, and uses customer information where we reasonably believe that it will help administer our business or provide services to our customers. We collect and retain customer information only for specific business purposes and upon request will inform customers why we are collecting and retaining the information. We use information to protect and administer records, accounts, and funds; to comply with certain laws and regulations; to help us design or improve our services; and to understand the financial needs of our customers. Preferred Trust is an accredited member of the Better Business Bureau.

Preferred Trust Company, LLC, 6700 Via Austi Parkway, Suite 301, Las Vegas, Nevada 89119,
702.990.7892 | 888.990.7892

[Unsubscribe](#) [Manage preferences](#)