

News

Dold Comments on Recent IRS Guidance on Roth Rollovers

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Elizabeth Dold was quoted in the Pension & Benefits Daily article “Recent IRS Guidance on Roth Rollovers Lifts Long-Standing Ambiguity, Practitioners Say” by Kristen Knebel published on October 3, 2014. The article discusses the IRS guidance in proposed rules (REG-105739-11, RIN 1545-BK08) and accompanying guidance in Notice 2014-54. Dold comments that “The ruling is great, it’s what people thought it was. When you get a distribution you can really direct your money any way you want and most people want to direct it to have a tax-free result. So it confirms that you can take your after-tax money and put it in your pocket, or put it into a RothIRA.”