

Link to Video: <https://www.youtube.com/watch?v=cRnPcdSai5o>

Link to Handout: [https://www.aaii.com/files/images/2020-05-13-AAII Tax Update Webinar.pdf](https://www.aaii.com/files/images/2020-05-13-AAII_Tax_Update_Webinar.pdf)

AAII Articles

Tax Rule Changes:

[Tax Guide Update: Staying Current on the New Rules](#)

[The Top SECURE Act Provisions Individual Investors Should Be Aware Of](#) (Hopkins)

[The Individual Investor's Guide to Personal Tax Planning 2019](#)

IRAs and Roth IRAs:

[Strategies for Managing Required Minimum Distributions](#)

[Roth Versus Traditional IRA Decision Tree](#)

[Roth IRA Conversion Spreadsheet](#)

[State Law May Protect Inherited IRA Assets From Creditors](#)

[Supreme Court: No Bankruptcy Protection for Inherited IRAs](#) (2014)

[New Rules for IRA Rollovers](#) (2014)

[Be Aware of IRA Rollover Rules](#) (2014)

Online Tax Services:

[The Most Popular Tax Preparation Services Used by AAII Members](#)

Charles' Investor Update Columns

[What to Do With the Stimulus Check](#)

[The CARES Act and Tax Rule Changes](#)

[Considerations for Roth IRA Contributions and Conversions](#)

Tax Resources That Charles Uses

[IRS.gov](#)

[Wolters Kluwer](#)

[J.K. Lasser's Your Income Tax](#)

[The Kiplinger Tax Letter](#)

[My Tax News Twitter List](#)

[TurboTax](#)

[AAII Tax Guide](#)

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Charles' Recent Reading

[Dear Shareholder: The best executive letters from Warren Buffett, Prem Watsa and other great CEOs](#), by Lawrence A. Cunningham (Harriman House, 2020)

[Buffett Letter to Shareholders](#)