

Individual Retirement Accounts, or IRAs, allow individuals to save money while deferring taxes or, in some cases, avoiding taxes altogether.



Since they were introduced, in 1974, numerous kinds of IRAs have appeared. Each one—from the traditional IRA and the Roth IRA, to the SEP IRA and the Stretch IRA—is tailored for different clients with specific needs.

And IRAs continue to evolve. Significant changes have been signed into law on seven occasions, paving the way for specialized new versions and increasing the amount that can be contributed to the accounts.

Copeland Wealth Management stays on top of all the changes within the IRA world. So whether you are looking to roll over your 401(k) assets, create retirement accounts for your employees, or simply get the most out of your retirement savings, we can steer you to the right IRA solution.