



Michael A. Gordon, CPA, LLC (an S corporation)
“Not Your Basic Bean Counter”
290 S. 4th Street, Coos Bay, Oregon 97420 541-269-1272

Date

HAVE YOU TAKEN YOUR “REQUIRED MIMINUM DISTRIBUTION”?

Greetings!

This is just a short letter to make sure that you are aware of the “required minimum distribution” rules pertaining to your retirement account(s).

In preparing your tax returns for this year we noticed that you have reached (or surpassed) the great age of 70 ½. The IRS says that you have to start taking minimum distributions once you reach 70 ½ if you have a retirement account. We don’t see where this has happened. It appears to us that you do have a retirement account and you should be taking minimum distributions. We could be wrong! We just want to communicate with you so this issue can be adequately settled.

The IRS assesses a penalty if you don’t start taking a minimum distribution at the proper time, so that’s why we care. Please feel free to call us so we can discuss this issue.

Sincerely,

Michael Gordon, CPA

Visit our website at www.mikegordoncpa.net

Member: [American Institute of CPAs](#) and [Oregon Society of CPAs](#)

Email: mike@mikegordoncpa.net

