ED SLOTT AND COMPANY, LLC
America's IRA Experts

JOIN AMERICA'S IRA EXPERTS!

Ed Slott | Beverly DeVeny | Jeffrey Levine | Sarah Brenner

Ed Slott and Company's Exclusive 2-Day IRA Workshop

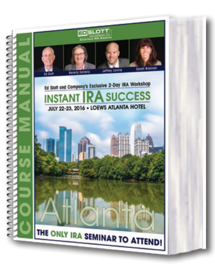
INSTANT IRA SUCCESS

JULY 22-23, 2016 • LOEWS ATLANTA HOTEL

"There is SO much information, you get hit with a fire hose the first time you are there."
—Dennis Drake, Wilmington, DE

Receive a 400+ Page Reference Manual
to Help Your Business Navigate a $7.4 Trillion Marketplace!

"This manual is a goldmine!"
—Ken Friedman, Jacksonville Beach, FL



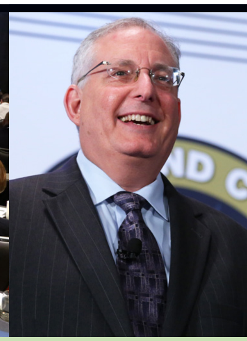
GROUP DISCOUNTS AVAILABLE—
BRING YOUR OFFICE!

CE Credits Available

To Register or Learn More Call: 877-337-5688 Email: info@irahelp.com Visit: www.irahelp.com

Join the Retirement Planning Conversation

Use Hashtag #InstantIRASuccess to Promote Your Education

ARE YOU DIFFERENTIATING YOURSELF IN A COMPETITIVE MARKETPLACE?

IRAs are thriving – amassing over $7.3 trillion in total nationwide assets. And they show no signs of slowing down. The last Baby Boomer recently hit age 50 – and there are 10,000 retiring each day.

Why not focus your business where the money is?

Many financial advisors can identify prospects through clever marketing and the latest sales pitch, but do they have the education to close the deal, ease a prospect's retirement fears and position themselves as an expert in their field?

These are questions with answers that require action. Recognizing that IRAs are winning the retirement race is the first hurdle to surpass. Learning the latest tax rules and countless IRA pitfalls that trip up less-informed advisors starts by spending 2 days with us in Las Vegas.

This workshop isn't a pre-formatted seminar with outdated marketing language and technical information that only reaches the periphery. It's an educational experience that provides:

- The most up-to-date technical expertise with a plan that turns ideas into action
- Built-in networking and Q&A time with our IRA Technical Experts
- A 400+ page manual that reinforces the information covered in Atlanta

Find not just new business, but the *best* business while specializing in the second half of the retirement game.

WHAT ATTENDEES ARE SAYING...

"Ed Slott's Instant IRA Success is a game-changer. It will be the difference in securing my clients' financial future and my professional reputation."
—Jim Retter, Collinsville, IL

"If you want to become the best advisor in your area, you must learn from the best in the nation."
—Douglas C. Nickson, Bellevue, WA

"I have been in this business for 15 years. It is hard to get that NEW motivation and enthusiasm. I am more excited about this business than I have been in years."
—David Peterson, Littleton, CO

"Within the first 30 minutes of Ed's workshop, I realized I had made a common IRA planning mistake. I called my office and stopped a transaction saving my client tax on $136,000 and saving the relationship. This program paid for itself within the first hour I was here!"
—Jim Flanagan, Naperville, FL

"This level of training sets me apart from other less-informed advisors and puts me in a better position to help our clients negotiate one of the most complicated areas of the tax code. Ed's training is mandatory."
—Pete Thompson
Honolulu, Hawaii

JOIN THE CONVERSATION EVERY DAY!

AmericasIRAExperts | @theslottreport #instantIRAsuccess | edslottandcompanyira | www.theslottreport.com | edslott

www.irahelp.com Tel: 877-337-5688 Fax: 215-575-0401

2 days of educational and empowering IRA strategies and sales ideas!

DAY ONE

Breakfast / Registration — 8:00 am – 8:45 am
Session One — 8:45 am – 10:15 am

Crush the Competition / How to Use Your IRA Expertise to Gain a Competitive Edge / IRA and Plan Distribution Rules

- Introduction - How to Make the Most of Your Investment in This Program
- How to Gain a Competitive Edge and Increase Your Value
- How to Capitalize on ANY Recent Event, Tax Law Change or Trend (Good or Bad!)
- 7 Ways to Differentiate Yourself from Everyone Else Competing for IRA Assets
- RMD Rules to Retirement Plan Contribution Limits

Break — 10:15 am – 10:45 am
Session Two — 10:45 am – 12:00 noon

Stretch IRA / Beneficiary Forms / Custodial Documents / The Best IRA Resources for You

- The Power of the Stretch IRA
- Why Most Beneficiaries Overpay Their Taxes
- Common Mistakes in Setting up Inherited (Stretch) IRAs
- IRA Beneficiary Form Mistakes That Wipe Out Inheritances
- How to Use the IRA Beneficiary Form to Build Referrals
- IRA Beneficiary Selection
- What to Look For in IRA Custodial Documents
- 10-Point IRA Custodial Document Checklist One Dozen Questions Advisors Must Ask
- How to Keep Building Your IRA Knowledge – The Best IRA Resources for You

Lunch — 12:00 noon – 1:00 pm
Session Three — 1:00 pm – 2:45 pm

IRA Update / Roth Conversion Planning / 3 Roth Conversion Questions You Need to Ask / Estate Planning with Roth IRAs

- IRA Update: Roth IRA Conversion Tax Planning
- The 3 Questions to Ask in Every Roth Conversion Evaluation
- Who Should and Who Should Not Convert
- Estate Planning with Roth IRAs
- Roth Conversion, Recharacterization and Re-conversion Strategies
- Roth Conversions from Company Plans
- Inherited Roth IRAs
- Roth 401(k), Roth 403(b) and Roth 457(b) Contribution and Distribution Rules

Break — 2:45 pm – 3:15 pm
Session Four — 3:15 pm – 5:00 pm

IRA Update (Continued) – The Latest IRA Changes, Rulings and Cases / 25 IRA Rules You Must Know (Part One)

- IRA Update: The Latest IRA Tax Law Changes, New Tax Strategies, Rulings, Court Cases and Planning Opportunities
- 25 IRA Rules You Must Know and How to Capitalize on Them (Part One)

Highlights Include:

- When Required Distributions Must Begin
- Year of Death Required Distributions
- IRS Reporting Requirements
- Eligible Rollover Distribution Mistakes

DAY TWO

Breakfast — 8:00 am – 9:00 am
Session One — 9:00 am – 10:15 am

25 IRA Rules You Must Know (Part Two)

- 25 IRA Rules You Must Know and How to Capitalize on Them (Part Two)

Highlights Include:

- Required Distributions on Inherited IRAs
- Non-Spouse Beneficiary Rules
- The 5-Year Rule Confusion and Mistakes that Most Institutions and Advisors Make
- Splitting IRAs in Divorce
- Early IRA Withdrawals – Penalty Exceptions
- Spousal Rollover Rules
- 60-Day Rollover Relief
- Creditor Protection for Plans and IRAs
- Wills vs. Beneficiary Forms – Why This is a Big Deal

Break — 10:15 am – 10:45 am
Session Two — 10:45 am – 12:00 noon

The Missing Estate Plan / Life Insurance Planning With IRAs / Income in Respect of a Decedent and Other Overlooked Tax Breaks for IRA and Plan Beneficiaries that Most CPAs Don't Know About

- The Missing IRA Estate Plan…Means More Money for YOU
- Use of Life Insurance to Protect IRA Values
- IRA Strategies to Increase Your Insurance Sales
- Coordination of Estate Planning and IRA Distribution Planning
- The 3 Biggest Tax Breaks in the Tax Code and How to Make Sure Your Clients Get Them All – Creating the Perfect IRA Estate Plan
- Income in Respect of a Decedent (IRD)
- How to Calculate the IRD Deduction in 5 Easy Steps

Lunch — 12:00 noon – 1:00 pm
Session Three — 1:00 pm – 2:45 pm

Naming Trusts as IRA Beneficiaries…Everything You Need to Know / Latest IRA Trust Rulings and Planning Strategies

- Separate Account Rules for Multiple IRA Beneficiaries – Splitting IRAs
- Naming Trusts as IRA Beneficiaries – When You Should and When You Shouldn't
- Avoid Major IRA Trust Mistakes That Most Other Advisors Make Routinely
- Conduit Trusts vs. Accumulation Trusts
- How to Determine RMDs When a Trust is the IRA Beneficiary
- The Latest IRA Trust Rulings
- 10-Point IRA Trust Checklist

Break — 2:45 pm – 3:15 pm
Session Four — 3:15 pm – 5:00 pm

How to Attract Large IRA Rollover Clients / Advising Clients on Key Rollover Decisions

- How to Attract Large IRA Rollover Clients
- Advising Clients on Key Rollover Decisions
- NUA (Net Unrealized Appreciation) Rules and Strategies for Employer Stock
- 5 NUA Mistakes You Cannot Afford to Make
- What You Need To Know About Special 10-Year Averaging
- 72(t) Rules for Early IRA and Plan Distributions
- How to Avoid the Most Common 72(t) Tax Traps

IMPORTANT: In order to receive CE credits, you must be present from 8:30 am to 5:30 pm on both days.

www.irahelp.com Tel: 877-337-5688 Fax: 215-575-0401

YES! Please register me for Ed Slott and Company's Exclusive 2-Day IRA Workshop: Instant IRA Success

REGISTRATION FORM – JULY 22-23, 2016 - ATLANTA, GA

Please fax completed form to 215-575-0401 or mail your completed registration form to:
Ed Slott and Company, LLC, 1518 Walnut Street, Suite 1702, Philadelphia, PA 19102
Online registration available at www.irahelp.com

Continuing Education

CFP – **14 CREDITS**
PACE – **14 CREDITS**
NASBA (for CPAs) – **14 CREDITS**
IRS – **14 CREDITS**
CLE packets will be available for attorneys

Insurance Credits by State

14 CREDITS: AL, AK, AR, AZ, CA, CO, CT, DE, DC, FL, GA, HI, ID, IN, IA, KY, LA, ME, MD, MI, MN, MO, MS, MT, NC, ND, NE, NV, NH, NJ, NM, NY, OH, OK, OR, PA, RI, SC, TN, TX, UT, VA, VT, WA, WI, WY

12 CREDITS: IL, KS, MA, WV

10 CREDITS: SD

PACE:

LUTC Fellow FSS

CFP	ChFC®
CLU®	CASL™
RHU®	REBC®
CLF®	CAP
MSFS	MSM

Please check www.IRAhelp.com for the type of insurance credits offered
NY – course is approved for Life Brokers (LB), Life Consultants (C1), Life Settlement Brokers (LSB), and Life/Accident and Health Agents (LA)
IRS – course is approved for Enrolled Agents (EA) and Enrolled Retirement Plan Agents (ERPA)
Ed Slott and Company, LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.
Prerequisites or Advanced Preparation: None | Program Level: Intermediate | Delivery Method: Group-Live

IMPORTANT: In order to receive CE credits, you must be present from 8:30 am to 5:30 pm on both days.

☐ Single Payment of $1995

Payment Plans Available!

Call or Register at **IRAhelp.com**

ATTENDEE INFORMATION **Attendee Registration Fee $1995**

First Name* Last Name*
First Name for Badge*
Company
Job Title*
Address 1*
Address 2
City* State* Zip Code*
Phone* Cell Phone* Fax
Email* Optional Registration Code
How Did You Learn About This Workshop?

PAYMENT INFORMATION
Please charge the registration fee to my:
☐ Visa ☐ MC ☐ Discover ☐ Amex ☐ Gift Card
CC Account # Exp. Date
Name on Card CCV #

I'D LIKE TO STAY AT THE LOEWS ATLANTA HOTEL FOR AN ADDITIONAL $199/NIGHT

NUMBER OF ROOMS: ☐

Must Reserve By 6/28/16 to receive this discounted rate

FOR THE NIGHTS OF:

Thurs and Fri July 21 & 22 ☐

Thurs, Fri & Sat July 21, 22 & 23 ☐

Number of Attendees:	**NEW Price per Attendee:**
1	$1995
2	$1595
3-9	$1495
10+	$1295

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Ed Slott and Company has a "no refund" policy. In the event of cancellation, your payment will be transferred to the next 2-Day IRA Workshop or eSeminar Series.