



Ed Slott, CPA



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

INSTANT IRA SUCCESS

Including the latest updates
from the **SECURE Act**

July 9 - 10, 2020 | Nashville, TN



"This program, with its emphasis on the SECURE Act, empowered me to start immediate discussions with my clients today for a better tomorrow. What I was reminded of at this training was that being complacent hurts a client. I strive for excellence by being up to date on new tax rules and strategies to make sure I am maximizing my clients' potential retirement and legacy for which they have worked so hard. They deserve it and should demand this, because it's all about them. Fantastic education! Wonderful presentation!" — Leticia Hewko, Tustin, CA



Take Home a 400+ Page Reference Manual!
"This manual is a goldmine!"

—Ken Friedman, Jacksonville Beach, FL



Is Your Company
Up to Speed? Group
Discounts Available



CE Credits
Available

To Register or Learn More **Visit:** irahelp.com/2-day **Call:** 800-663-1340 **Email:** info@irahelp.com

Join the Retirement Planning Conversation





MASTER THE SECURE ACT

The **SECURE Act** is the most significant retirement security legislation in more than a decade. From raising the age of RMDs to removing roadblocks for annuities within company plans, **are you prepared to answer your clients' questions and be a knowledgeable fiduciary in this new terrain?**



RECOGNIZE NEW BACK-DOOR ROTH OPPORTUNITIES

By repealing the maximum age for IRA contributions, more clients will be eligible to complete Roth conversions. *However*, with recharacterizations eliminated, knowledgeable expertise is more important than ever to avoid costly and irreversible mistakes!



RIP STRETCH IRAS

Congress has pulled the rug out from retirees late in the game—especially those with large IRAs! Join us to learn **the five new strategies** that you can use to give your clients post-death control and minimized taxes.



CAPITALIZE ON THIS UNPRECEDENTED OPPORTUNITY

What's changing in the financial industry?

Stock market, interest rates, tax laws, political and regulatory environment—obstacles and volatility are a constant variable.

What can you count on for the future of your business?

Death and taxes. Capitalize on money that we know will be in motion and start mastering the advanced strategies your clients (and competition) don't know.

IRAs are thriving, amassing over \$9.5 trillion in total assets nationwide. This volume paired with the complex and ever-changing intricacies of the tax code surrounding IRAs make this the single most significant opportunity for educated advisors to:

1. Deliver considerable tax-saving value to their clients today; AND
2. Build a strategic wealth retention plan for future generations

The bottom line: More after-tax money for clients, their future heirs and your business!

It all starts by spending two days with us, America's IRA Experts, at *Instant IRA Success*. Join us for:

- **The most-up-to-date IRA expertise**, including new opportunities and planning considerations stemming from the SECURE Act and the Tax Cuts and Jobs Act
- **An action plan** to implement into your business immediately to protect your clients and prospects from avoidable (and costly) planning errors
- **A 400+ page manual** to take home and use as a practical reference guide, along with CE credits
- **Direct access to our team of IRA Experts** through built-in networking and Q&A time



WHAT ATTENDEES ARE SAYING...

"Outstanding 2 days of training! 40 years in the business and this was an eye-opening experience! What you don't know CAN hurt you."
— Chuck Price, Portland, OR

"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, IL

"The emphasis on the SECURE Act was critical. No amount of self-study could prepare me as well as the Slott team!"
— Scott Dewhurst, New York, NY

"I was able to show a prospect (now client) how to save \$52,000 on their RMDs from the material at this training! Their CPA loved it and so did the client."
— Larry Schuffman, Pensacola, FL

"Without this course, any professional advising clients on IRAs could make costly, in some cases savings-crushing, mistakes."
— Lisa Barram, Fort Washington, PA

"Ed Slott and Company's 2-Day IRA Workshop not only provided detailed explanations and illustrations of the latest updates from the SECURE Act, but the experts were dynamic, engaging and provided key ideas to help pre- and post-retirees maximize tax favorable treatment! I learned many valuable ideas to help my current and future clients. The education is top notch!"
— Maria Muth, Somerville, NJ

YES!**Please register me for Ed Slott and Company's Exclusive 2-Day IRA Workshop: Instant IRA Success****Registration Form – July 9-10, 2020 in Nashville, TN****Register online at irahelp.com/2-day**

You may also call, fax, or email us using the information at the bottom of this page. If paying by check, please mail it to Ed Slott and Company, LLC at 100 Merrick Road, Suite 200E, Rockville Centre, NY 11570

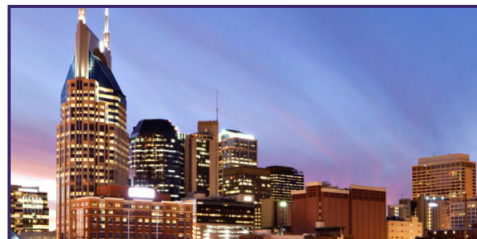
Continuing Education Credits Offered**Designation Credits****CFP® – 14 CREDITS**THE AMERICAN COLLEGE (WMCP®, RICP®, CHFC®, FSCP®, CLU®) – **14 CREDITS****NASBA (CPE) – 14 CREDITS****IRS – 14 CREDITS**

CLE self packets will be available for submission to your respective state.

Please check irahelp.com for the types of insurance credits offered****NY – course is approved for Life Brokers (LB), Life Consultants (CI), Life Settlement Brokers (LSB), and Life/Accident and Health Agents (LA)********IRS – course is approved for Enrolled Agents (EA) and Return Preparers (OTRP)**

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Prerequisites or Advanced Preparation: None | Program Level: Intermediate | Delivery Method: Group-Live

Insurance Credits by State**14 CREDITS:** AK, AL, AR, AZ, CA, CT, CO, DC, DE, FL, GA, HI, IA, ID, IN, KY, LA, MD, MI, MN, MO, MS, MT, NC, ND, NE, NM, NV, NY, OH, OK, OR, PA, RI, SC, TN, TX, UT, VA, VT, WI, WY**13 CREDITS:** ME **12 CREDITS:** IL, KS, MA, NH, WV**10 CREDITS:** SD **2 CREDITS:** WA**CE credits are subject to change.***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!****Register at IRAhelp.com/2-day****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* Promo 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 #

Number of Attendees:**Price per Attendee:**

1	\$1995
2	\$1595
3-9	\$1495
10+	\$1295

**Discount codes and group rates cannot be combined*

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

NUMBER OF ROOMS:

**MUST RESERVE BY JUNE 13, 2020
TO RECEIVE THIS DISCOUNTED RATE**

FOR THE NIGHTS OF:

**Wed & Thurs
July 8 – 9**

**Wed, Thurs & Fri
July 8 – 10**

irahelp.com/2-day**Tel: 800-663-1340****Fax: 516-536-8852****Email: info@irahelp.com**

DAY ONE

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

Navigating the SECURE Act / Planning for the End of the Stretch IRA / 3 Beneficiary Categories / Eligible Designated Beneficiaries (EDBs) – Who Qualifies?

- Introduction and Program Overview
- SECURE Act – Summary of Key Changes
- Retirement Plan Contribution Limits
- The End of the Stretch IRA – SECURE Act Planning Solutions
- 3 Beneficiary Categories Under the SECURE Act
- Eligible Designated Beneficiaries (EDBs) – Who Qualifies?

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

SECURE Act Impact on Stretch IRAs / How Post-Death Payout Rules Will Work / Practice Examples / Beneficiary Forms / Custodial Document Checklist

- SECURE Act – How Post-Death Payouts Will Work
- Practice Examples – Post-Death Payouts Based on the Type of Beneficiary
- Why Most Beneficiaries Overpay Their Taxes
- Common Mistakes in Setting up Inherited 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
- IRA Custodial Document Checklist – One Dozen Questions Advisors Must Ask

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

25 IRA Rules You Must Know (Part One)

- 25 IRA Rules You Must Know and How to Capitalize on Them, Including New Rules Under the SECURE Act (Part One)

Highlights Include:

- IRA Distribution Basics
- Aggregating Distributions
- Year-of-Death Distribution – Who Takes It?
- IRAs Don't Generally Pass Through Wills
- Two Different 5-Year Rules for Roth IRAs
- SEP and SIMPLE IRA Confusion
- Qualified Domestic Relations Orders (QDROs) Do *Not* Apply to IRAs
- A Non-Spouse Beneficiary Cannot do a Rollover
- The 10% Penalty Exceptions

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

25 IRA Rules You Must Know (Part Two)

- 25 IRA Rules You Must Know and How to Capitalize on Them, Including New Rules Under the SECURE Act (Part Two)

Highlights Include:

- Splitting IRAs
- No Deadline for a Spousal Rollover
- 20% Withholding Tax Rule
- Eligible Rollover Distributions (ERDs)
- Tax Breaks for IRA and Plan Beneficiaries
- Rollover or Transfer? – 60-Day Rollover Relief
- Roth IRA Beneficiaries Must Take RMDs
- Correcting Excess IRA Contributions

Optional Session**5:15 pm – 5:45 pm**

*Path to Building a Successful Advisory Practice
Presented by Brookstone Capital Management
Cocktail Reception to Follow*

DAY TWO

Breakfast**7:30 am – 9:00 am****Optional Session****8:00 am – 8:45 am**

Learn More About Ed Slott's Elite IRA Advisor GroupSM

Session One**9:00 am – 10:15 am**

Roth Conversion Planning / 3 Roth Conversion Questions You Need to Ask / Estate Planning with Roth IRAs / Roth 401(k) Rules / IRA Update – The Latest IRA Changes, Rulings and Cases

- Roth IRA Tax Planning After the SECURE Act
- The 3 Questions to Ask in Every Roth Conversion Evaluation
- Who Should and Who Should Not Convert
- Estate Planning with Roth IRAs
- Roth Conversions from Company Plans
- Roth 401(k), Roth 403(b), and Roth 457(b) Contribution and Distribution Rules
- IRA Update: The Latest IRA Tax Law Changes, Including the SECURE Act, New Tax Strategies, Rulings, Court Cases and Planning Opportunities

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

Naming Trusts as IRA Beneficiaries...Everything You Need to Know / SECURE Act Effect on IRA Trust Planning / Latest IRA Trust Rulings and Planning Strategies

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

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

How to Use the SECURE Act to Attract Large IRA Rollover Clients / Advising Clients on Key Rollover Decisions

- How to Use the SECURE Act to Attract Large IRA Rollover Clients
- Advising Clients on Key Rollover Decisions
- Net Unrealized Appreciation (NUA) Rules and Strategies for Employer Stock
- 5 NUA Mistakes You Cannot Afford to Make
- 72(t) Rules for Early IRA and Plan Distributions
- 72(t) IRS Rulings and Court Cases

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

The Missing Estate Plan / IRA Estate Planning Strategies After the SECURE Act / Life Insurance Planning with IRAs

- The Missing IRA Estate Plan...Means More Money for YOU
- IRA Estate Planning Strategies – New Strategies After the SECURE Act
- How to Plan for Estate Tax Uncertainty
- Use of Life Insurance to Protect IRA Values – SECURE Act Impact
- IRA Strategies to Increase Your Insurance and Annuity Sales
- Planning for State Estate Taxes
- The 2 Biggest Tax Breaks in the Tax Code and How to Make Sure Your Clients Get Them – Creating the Perfect IRA Estate Plan

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