



ED SLOTT, CPA | AMERICA'S IRA EXPERT

POPULAR EVENT FORMATS AVAILABLE BOTH LIVE & VIRTUAL

Advisor Training Programs (1-2 HOUR PRESENTATIONS)

Want to attract leading financial advisors to your organization? Looking for ways to deliver increased value and fuel business growth for your affiliated advisors? Book Ed Slott to headline your next event to pack the house with the best of the best—those who are committed to:

- Maintaining ethical integrity & professional education
- Serving their clients' best interest with high-value financial planning and
- Working with high-net-worth and high-income clients

Top Advisor Client Workshops (1 HOUR PRESENTATION)

Whether you are a financial institution or an individual advisor, establish a competitive edge by booking Ed Slott for a consumer workshop! Be it live or virtual, there is no one more effective at educating and motivating consumers to take action (with the help of their financial advisor!) than America's IRA Expert. With engaging insights from a nationally recognized and objective third-party CPA, attendees will leave with a new understanding, openness and excitement to discuss risk-managed investment strategies and tax-advantaged retirement products, such as life insurance and annuities they may have not otherwise considered.

Referral Relationship Builder (1-2 HOUR PRESENTATIONS)

Want to forge or strengthen relationships with CPAs, attorneys or other financial professionals in your network? Host an event with America's IRA Experts offering timely CE/CPA educational opportunities. This creates the perfect forum to showcase how your services and expertise can deliver new value to their clients and forge meaningful and mutually beneficial partnerships.

IRA Leadership Program (1.5-DAY WORKSHOP)

Financial institutions and their advisors have a demand for IRA coaching and educational programs, as well as access to the most up-to-date IRA information. This is a comprehensive and customizable corporate training program that:

- Transforms the business growth mindset to one that establishes education as the top revenue driver
- Delivers a wealth of IRA strategies that save relationships, grows client bases, and emulates fiduciary responsibilities
- Provides technical expertise to help your advisors become recognized IRA leaders

Program Features

- Customized presentations tailored for your audience and up-to-the-minute news
- CE / CPE eligible content
- Interactive Q&A with the team of America's team of IRA Experts, either live or via chat
- For online programs, virtual polling opportunities may be available that can deliver powerful insights for highly targeted follow-up to key relationships (subject to your hosting technology)

BOOK ED SLOTT

Get started now! Contact Laurin Levine at (516) 536-8282 or email laurin@irahelp.com to discuss pricing and planning.



Web: irahelp.com • Email: info@irahelp.com • Phone: **800-663-1340**

Twitter: @theslottreport • Facebook: AmericasIRAExperts • LinkedIn: Ed Slott and Company • YouTube: EdSlottandCompanyIRA



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SIGNATURE SPEAKING TOPICS 2024 AVAILABLE BOTH LIVE & VIRTUAL

Note: All presentations can be customized for your audiences and will be updated to reflect up-to-the-minute tax law changes.

Ed Slott's Top Retirement Tax Planning Opportunities for 2024: Maximize Client Value & Your Competitive Advantage with Limited-Time Strategies

Time is ticking to lock in historically low tax rates and transform client outcomes! Consider this a 2-year sprint to capitalize on expiring tax breaks and strategic planning windows before scheduled tax increases take effect. Whether the stock market is up, down, or sideways—*boost your business and cement your value as a knowledgeable advisor with these urgent, high-value conversations.* Join America's IRA Expert, Ed Slott, CPA, for his most timely insights to share with your clients, their beneficiaries, prospects, and centers of influence *before the clock runs out!*

- **Capitalizing on the 2024 perfect storm of opportunity to increase your income** by providing clear tangible value to your clients and your future clients (*the beneficiaries who will be inheriting large IRAs*).
- **How to discuss retirement, tax and estate planning after the SECURE Act and SECURE 2.0** (*Hint: IRAs won't work anymore as a wealth transfer vehicle. Existing estate plans need updating immediately, and life insurance is more valuable than ever before!*)
- **2024 RMDs:** Sorting out the latest SECURE Act RMD complications—especially the 10-year rule for IRA beneficiaries.
- **New little-known ways to reduce RMDs with IRA annuities.**
- **Strategies for evaluating Roth conversions** to eliminate the uncertainty of future, higher tax bills.
- **New rules affecting many spousal beneficiaries starting in January** and other overlooked effects of SECURE 2.0 that can significantly impact your clients' financial plans.
- **New SECURE 2.0 401(k) and Roth 401(k) rules taking effect:** These are limited-time tax-planning opportunities for high-income clients, allowing them to make plan catch-up contributions and maximize their 401(k) tax deductions.
- **New and improved charitable planning strategies**, including the new TRIPLE WIN solution fulfilling RMD requirements, gifting to charitable causes, *and* creating annuity income for your clients.
- **Bottom line takeaways for advisors:** You'll learn how to create a 2024 action plan to immediately grow your business by using these limited-time strategies to help your clients and their families keep more of their retirement savings protected from looming higher taxes. *Everyone wins!*



The Big Decision: Rollover, Stay Put or Withdraw?

With more than 250,000 employees impacted by layoffs in the tech sector alone in 2023, more people than ever are in need of knowledgeable advice for managing their company retirement plans. Plus, from the DOL to SEC Reg BI and various state departments continuing to advance best interest standards and documentation procedures, **most financial advisors are not prepared to help clients with critical rollover decisions**. These are regulations that are actively in effect today! Learn the exact process you need in order to act as a fiduciary advising on rollover decisions, including:

- The 3 options available for a company plan when leaving an employer
- Explaining the drawbacks, considerations and benefits of each option to clients
- The 17 questions to ask and document with your clients when navigating rollover decisions
- Costly pitfalls to avoid creating a significant taxable event

Gifting Strategies: Planning Lifetime Transfers

The golden age of gifting is here **now!** 2024 provides generous gift and estate planning opportunities; it is urgent that you connect with clients now to avoid missing out on the best tax planning options *that may disappear after this year*. This advanced program not only goes through the three tiers of tax-exempt gifting but also illustrates with clear examples how taxable gifts can **save millions in taxes**. The math is undeniable. Heads of families are always looking for simple ways to transfer wealth to their children and grandchildren tax efficiently — *without getting involved in more complex trust and estate planning*. This program provides easy, yet compelling and often overlooked solutions to implement immediately, such as:

- The strategies that can enable your high-net-worth clients to **instantly pocket millions in estate and income tax savings**
- The 3 tiers of **tax-exempt gifting**, and why many of these opportunities are routinely missed
- **Unprecedented business-succession planning opportunities** are in play right now, but may not be for long
- How to **lock in today's generous gift and estate tax exemptions**—*before they are reduced*. (Even IRS says *it's ok — use it or lose it!*)
- How to **address clients' practical concerns about gifting**, including control and beneficiary issues

Projecting Tax on 2024 Roth Conversions

Avoid surprises at tax time next year with this comprehensive, practical guide to evaluating the tax cost of a year-end Roth conversion. While Roth IRAs may be one of the greatest tax gifts available today, understanding the cost of converting is a key piece of the equation when evaluating for a client. Accurate tax projections are more important than ever thanks to the Tax Cuts and Jobs Act making Roth conversions **permanent**. There are no do-overs! After this 1-hour crash course, you will understand:

- Items to take into account for Roth IRA tax projection
- How to identify the **5 most misunderstood tax effects** of a Roth conversion
- The **tax traps and opportunities** to consider — *before advising on a conversion*
- Why the opportunity-cost argument against Roth IRA conversions *doesn't hold up*
- How to **avoid wasting valuable tax deductions** by not converting
- **The tax effects of recent tax acts** and IRS rulings on Roth conversions



Ed Slott's Best Year-End Strategies: Retirement Tax Planning

The final weeks of 2024 present a critical planning window for advisors to connect with clients, prospects, and centers of influence on the best tax planning options of the year. Learn CPA and recognized IRA Expert Ed Slott's best strategies to help clients reap tax savings from tax planning moves *that may not be available after this year*.

- Advise on year-end Roth conversions to **eliminate the uncertainty of future higher tax bills**
- **Turn ordinary 401(k) income into capital gains** using the tax break for net unrealized appreciation for company stock – *many employees and their advisors have no idea this is even available to them!*
- **Last-minute tax-efficient charitable planning strategies** using QCDs (qualified charitable distributions)
- **Life insurance planning moves** after the SECURE Act eliminated the stretch IRA
- How to **lock in the generous gift and estate tax exemptions** before they are reduced
- **Estate planning after the SECURE Act** – *plans need updating immediately*



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CONSUMER PROGRAM
AVAILABLE BOTH LIVE & VIRTUAL

Retirement Planning in 2024: Move Your Retirement Funds from Forever Taxed to Never Taxed

A series of major changes to retirement tax rules have recently taken effect, impacting all retirees today! This is a totally unique, entertaining and educational presentation delivered by Ed Slott for consumers who have spent a lifetime saving for their retirement and now need to know how to protect those savings from taxes. The program focuses on creating a plan to reduce or eliminate the heavy taxes on distributions from IRAs, 401(k)s and other retirement savings, including Roth IRA conversions. Plus, learn the 3 biggest retirement risks and how to avoid them with proper planning. Here are some highlights:

- **New tax laws effective NOW** and how you can benefit
- **Is your IRA an IOU to the IRS?** How to ensure Uncle Sam is not your primary beneficiary
- **The single biggest benefit in the tax code** and how to make it work for you!
- **Volatile stock markets and your retirement** — *planning measures you can take*
- **Income planning** — *why it's even more important than assets in retirement*



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CHARITY / NON-PROFIT PROGRAM

Educate and inspire your donors with timely gifting strategies from America's IRA Expert!

Bring Ed Slott, CPA to share these timely issues and solutions with your organization. Your donors and your charitable organization will reap the rewards for generations to come:

Planned Giving with Your Retirement Accounts

Ready to disinherit the IRS, spare your heirs from unnecessary tax burdens *and* benefit the organizations that matter most to you? Tax-infested IRAs and retirement accounts are the best assets to leave to charitable groups, educational, medical or other non-profit institutions. However, with changes under the SECURE Act, the use of charitable remainder trusts or similar strategies may be needed to simulate the benefits formerly available through stretch IRAs. Learn the latest techniques to leverage your retirement accounts for maximum impact with smart tax planning—leaving more for your charity, more to your families, and less to the IRS.

WHAT CHARITABLE ORGANIZATIONS ARE SAYING:

“Holy moly what a refreshing and amazingly educational experience! Thank you for being such an incredible ambassador for our work. I just wanted to express deep and wide appreciation for the amazing caliber of your presentation. As a former professor, I simply LOVED the charm and humor with which you delivered such critical information. It was the trifecta of pedagogical perfection: you made us grin, you kept us engaged, and we learned game-changing information.”

— Mari Kim, Corporate and Foundations Relations Officer, Northwest Harvest



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BIOGRAPHY

Ed Slott is a nationally recognized IRA distribution expert, professional speaker, television personality, and best-selling author. He is known for his unparalleled ability to turn advanced tax strategies into understandable, actionable and entertaining advice. He has been named "The Best Source for IRA Advice" by *The Wall Street Journal*, and *USA Today* wrote, "It would be tough to find anyone who knows more about IRAs than CPA Slott."

As president and founder of Ed Slott and Company, LLC, the nation's leading source of accurate, timely IRA expertise and analysis to financial advisors, institutions, consumers and media, he provides:

1. Advanced training to financial professionals to become knowledgeable recognized leaders in the retirement marketplace; and
2. Answers to retirement savers' most important questions, continually providing practical, easy-to-understand information on IRA, retirement, tax and financial planning topics.

Mr. Slott is a [Professor of Practice at The American College of Financial Services](#) and regularly presents keynote presentations on IRA and estate planning strategies at both consumer events and conferences for financial advisors, insurance professionals, CPAs and attorneys, including virtual events drawing thousands of attendees nationwide. Among the most popular of his resources are his advanced training programs for financial professionals. He is the creator of Ed Slott's Elite IRA Advisor GroupSM, an organization of more than 500 of the nation's top financial professionals who attend his ongoing continuing-education programs to maintain a mastery of advanced retirement account and tax planning laws. Additionally, his [Instant IRA Success](#) program is a live 2-day IRA workshop covering up-to-the-minute information with immediately actionable intel, and [IRA Success](#) is an on-demand, CE-eligible, 12-course program powered by The American College of Financial Services.

Mr. Slott is an accomplished author of many financial books, with his latest, *The Retirement Savings Time Bomb Ticks Louder: How to Avoid Unnecessary Tax Landmines, Defuse the Latest Threats to Your Retirement Savings & Ignite Your Financial Freedom* (Penguin Random House, 2024) released in 2024. He also authors, [IRA Advisor](#), a monthly newsletter for financial professionals to stay educated on "all things IRA." His popular website, [irahelp.com](#), is a resource for financial professionals and consumers, where *The Slott Report* blog is followed by tens of thousands of readers. And in 2022, he launched a podcast, [The Great Retirement Debate](#), in collaboration with Jeffrey Levine, CPA/PFS, CFP®, providing lively commentary on opposing sides of retirement planning strategies.

As the go-to resource for media on timely insight on breaking news as it relates to retirement and tax planning laws and strategies, Mr. Slott is often quoted in *The New York Times*, *The Wall Street Journal*, *Forbes*, *USA Today*, *Kiplinger*, *Investor's Business Daily* and numerous additional national magazines and financial publications. He is also a contributing columnist and media resource to *Financial Advisor* and *InvestmentNews* magazines. He has appeared on many national television and radio programs, including *NBC*, *ABC*, *CBS*, *CNBC*, *CNN*, *FOX*, *Fox Business*, *NPR*, *Bloomberg* and *Morningstar*. He is one of the top pledge drivers of all time with his educational specials, including his most recent, *Ed Slott's Retirement Freedom!* (2022).

Mr. Slott has been recognized for his significant contributions to the financial industry as an *InvestmentNews* Innovator, Sidney Kess Award Winner for excellence in continuing education by the AICPA®, *ThinkAdvisor* Luminary Award winner, and recipient of the prestigious "Excellence in Estate Planning" and "Outstanding Service" awards presented by The Foundation for Accounting Education. He is a former board member of The Estate Planning Council of New York City and is Accredited Estate Planner (AEP) distinguished. He is also a past Chairman of the New York State Society of CPAs Estate Planning Committee and editor of the IRA planning section of the *CPA Journal*.

Ultimately, through all of these efforts combined, Mr. Slott has taught millions of Americans (and their financial professionals) how to get the most out of their retirement savings.



Web: irahelp.com • Email: info@irahelp.com • Phone: 800-663-1340

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RESOURCES:

The following files are available for use to market our speaking event. *Please do not stretch, distort or alter images from as they are provided, and submit all promotional materials to laurin@irahelp.com for pre-approval prior to distribution.*

- **Ed Slott and Company Logo:**
https://www.dropbox.com/sh/xgm76daoydsdlze/AAAQm_Y_YtLbyXTMU7-ouqgra?dl=0
- **Headshots:**
<https://www.dropbox.com/sh/ofmujjk0chjw50u/AAA6pBOsgyZ7YhXaMvY8ujYZa?dl=0>
- **Candid Photos:**
<https://www.dropbox.com/sh/nhfjd12fpflk0wr/AABnZ5dZOwZSMvoMc6mSLI9ta?dl=0>
- **Promotional Video:**
<https://youtu.be/-liMY6OQLgk>



WHAT THE MEDIA IS SAYING:

"Ed Slott is my go-to resource on the nuances of tax and retirement planning. His no-nonsense style makes the dizzying changes in the rules and laws surrounding these often-confusing topics understandable and more importantly, actionable."

— Jill Schlesinger, CFP®, CBS News Business Analyst

"Ed Slott has a knack for providing tax- and retirement-planning guidance that's easy to understand, up-to-the-minute current, and--dare I say it? Fun."

— Christine Benz, Director of Personal Finance, Morningstar, Inc.

"Ed Slott is among the most trusted and knowledgeable retirement experts in the United States. The world is filled with those who proclaim to be retirement experts, but Ed Slott is truly that—an expert who deserves your time and attention."— Robert Powell, editor of Retirement Daily and *TheStreet*, USA Today columnist, editor of *Retirement Management Journal* and host of *Exceptional Advisor* podcast

"Ed Slott is my go-to person for smart tax-saving advice on retirement plans."

— Jane Bryant Quinn, Author of *How to Make Your Money Last: The Indispensable Retirement Guide*.

"Ed Slott is the go-to expert on IRAs in an era when legislative and regulatory changes are popping up as fast and furious as a whack-a-mole game. Arm yourself with the latest insights on how to protect future retirement savings by making tax-savvy moves today."

— Mary Beth Franklin, CFP®, Contributing Editor, *InvestmentNews*

"Ed Slott is truly Mr. IRA."

— Lynn O'Shaughnessy, author of *The Retirement Bible*

"Unless you consider cat food a viable dinner option, it's wise to take action now to bulletproof your retirement assets. Sooner or later, we pay taxes. But why allow your retirement savings to become a windfall for Uncle Sam when the money should go to you and your heirs?"

— USA Today

