AMERICA'S IRA EXPERTS

DO YOU KNOW THE <u>#1 MOST IN-DEMAND SERVICE</u> FOR RETIREMENT SAVERS TODAY?

A recent Herbers & Company survey revealed that **tax planning** is the top service valued by clients with $250k+ in assets, *yet many feel they are not receiving it from their current financial advisors.*

In fact, 97% of the fastest-growing advisory teams provide tax planning, compared to just 49% of other firms. As potential shifts in tax policy emerge under the new administration, ***now is the time*** *to give your audience the planning insights they are seeking!*

BRING INFORMATIVE, ENTERTAINING AND ACTIONABLE TAX EDUCATION TO YOUR NEXT EVENT

Ed Slott and his team of America's IRA Experts frequently present **1-2-hour keynote presentations,** as well as **extended training courses** available in both live and virtual formats, providing the most up-to-date education available anywhere for:

- Financial advisors
- Insurance professionals
- CPAs
- Enrolled Agents
- Tax attorneys
- Financial institutions, organizations & membership groups
- Similar professionals wanting education on how to take financial control, avoid unnecessary taxes and combat the latest threats to retirement savings accounts
- Clients, consumers and civic organizations

ED SLOTT AND COMPANY, LLC
America's IRA Experts

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

X: @theslottreport · Facebook: AmericasIRAExperts · LinkedIn: Ed Slott and Company · YouTube: EdSlottandCompanyIRA

AMERICA'S IRA EXPERTS

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 and his team 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, Roth conversions 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 continuing-education 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 on taxes and retirement distribution planning to help your advisors or agents 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 & HIS TEAM

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

SIGNATURE SPEAKING TOPICS 2025
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.

The 2025 IRA Revolution:
Ed Slott's Guide to Turning Tax Challenges into Maximum Client Value

Navigating the Perfect Storm of Opportunity for Financial Advisors

Time is ticking to lock in historically low tax rates and transform client outcomes!

Recent data reveals a staggering $40 trillion in U.S. retirement assets, representing an unprecedented opportunity for savvy financial advisors. Join America's IRA Expert, Ed Slott, CPA, for an urgent and transformative presentation on maximizing retirement tax planning opportunities in 2025 and beyond. With new regulations and expiring low tax rates on the horizon, financial advisors must be prepared to guide their clients through this storm of opportunity. The demand for high-value tax planning services has never been greater, and ***the time to act is now.***

As tax laws evolve and potential policy changes loom, advisors must stay agile, ready to rethink traditional strategies to add significant value to clients' retirement outcomes and grow their businesses.

Key Focus Areas:

1. **Maximizing Client Value & Preparing for Policy Shifts:** How the new administration's tax agenda could reshape retirement strategies. Equip your clients to capitalize on potential changes with proactive planning.

2. **Ed Slott's Tax Planning Paradigm Shift:** Embrace the 'maximum, not minimum' distribution strategy. Learn why long-term tax planning should drive distribution decisions to control tax rates today, tomorrow, and beyond.

3. **Revolutionizing Wealth Transfer:** Discover why traditional IRAs are losing their edge and how to pivot your strategies for a new era of estate planning.

4. **Defying Higher Taxes:** Explore advanced strategies, from Roth conversions to life insurance and creative charitable planning, that can outsmart tax increases and amplify your clients' legacies.

Why Attend?
There is a significant gap between client expectations and advisor services, with tax planning topping the list of unmet needs. This presentation equips you with the knowledge and strategies to:

- Provide exceptional value to clients in their most desired area of expertise
- Protect retirement savings from looming tax hikes
- Grow your business by addressing critical client concerns
- Stay ahead in a rapidly evolving regulatory landscape
- Gain a competitive edge by offering solutions to the most pressing retirement planning challenges

Do not miss this opportunity to transform your practice and become the go-to expert for retirement tax planning in 2025 and beyond.

The Big Decision: Roll Over, Stay Put or Withdraw?

With **over 300,000 employees impacted by layoffs across sectors like tech, finance, and healthcare in 2024**, more individuals than ever are in need of knowledgeable advice for managing their company retirement plans.

Furthermore, **recent updates from the DOL, SEC Reg BI, and state-level regulations** have further tightened best interest standards and documentation procedures, leaving many financial advisors unprepared to guide clients through critical rollover decisions. **With increased scrutiny on compliance and fiduciary obligations, staying up to date on these regulations is more important than ever!** 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 <u>document</u> with your clients when navigating rollover decisions
- Costly pitfalls to avoid creating a significant taxable event

Gifting Strategies: Plan High-Value Lifetime Transfers

The golden age of gifting is here **<u>now!</u>** With gift and estate tax exemptions currently at historic highs, now is the time to act. Connect with clients now to avoid missing out on the best tax planning options *while they last.* 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

The Opportunity Boom: 7 Game-Changing Trends Advisors Can't Afford to Miss

With $40 trillion in retirement assets and more Americans turning 65 than ever, 2025 is a critical moment for financial advisors to build their businesses. Clients are increasingly leaving long-term advisors in favor of those with expertise in retirement tax and estate planning—*professionals who can navigate complex, evolving regulations like the SECURE 2.0 Act and new DOL rollover rules*. Advisors who understand these shifts can seize opportunities by:

- **Capturing their share** of the growing retirement market
- Aligning services with the tax planning needs of **high-net-worth clients**
- Capitalizing on **potential tax law changes under the new administration**

Now is the time to gain a competitive edge and secure your practice's growth in this dynamic environment.

Projecting Tax on 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 *does not 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 the year 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.

- 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**
- **Estate planning after the SECURE Act and SECURE 2.0**– *plans need updating immediately*

AMERICA'S IRA EXPERTS

CONSUMER PROGRAM
AVAILABLE BOTH LIVE & VIRTUAL

Your Plan, *NOT* the Government Plan

Retirement Planning in 2025: Move Your Retirement Funds from Forever Taxed to Never Taxed

"Taxes will be the single biggest factor that separates people from their retirement dreams."
– Ed Slott

New Retirement Tax Changes and Tax Savings Opportunities

A series of major changes to retirement tax rules have recently taken effect, impacting all retirees today!

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 and life insurance planning. Plus, learn the 3 biggest retirement risks and how to avoid them with proper planning.

This is a totally unique, entertaining and educational presentation for consumers who have spent a lifetime saving for their retirement and now need to know ***how to protect*** those savings from taxes.

Highlights include:

• **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 guaranteed income is even more important than assets in retirement*

It's how much you keep that counts – ***AFTER*** taxes, and IRA Expert, Ed Slott shows you how to ***keep more*** and pay less. He combines his extensive IRA tax knowledge with humor and stories that everyone can relate to. Consumers will reap substantial benefits instantly.

Ed Slott delivers an empowering and eye-opening experience!

CHARITY / NON-PROFIT PROGRAM

Educate and inspire your donors with timely gifting strategies from America's IRA Expert!
Bring Ed Slott and his team 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

AMERICA'S IRA EXPERTS

Ed Slott,CPA, 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 Group℠, 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, *Ed Slott and Company's 2-Day IRA Workshop, Instant IRA Success* program is a live seminar 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, *Ed Slott's 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.

SARAH BRENNER, JD
Director of Retirement Education

Sarah Brenner, JD, is a leading authority on IRA distribution planning with over twenty years of experience helping clients and financial professionals navigate complex technical IRA questions. Known for her engaging presentation style, Sarah skillfully uses clever pop culture anecdotes to make advanced IRA education both memorable and accessible. Her ability to demystify complicated retirement laws has made her a sought-after speaker at financial industry events and private trainings for professionals, including advisors, CPAs, and attorneys.

Sarah regularly presents to Ed Slott's Elite IRA Advisor Group[SM], a prestigious study group of top financial professionals, as well as at Ed Slott's 2-Day IRA Workshop and Ed Slott and Company's *IRA Success*, powered by The American College of Financial Services. In these sessions, she provides expert guidance on the complexities of IRA distribution planning, making her a trusted resource in the financial community. As part of her work with the study group, Sarah consults directly with clients of member advisors, gaining firsthand understanding of thousands of Americans' top IRA questions each year. This unique exposure provides her with key insights and perspective on the pulse of IRA concerns across the country. Sarah is also a featured Expert on The American College's Knowledge Hub+ platform.

Her expertise has been widely recognized in the media, where she has been frequently quoted by *The Wall Street Journal* and *USA Today*, and she has contributed articles to *TheStreet.com*. In addition to her media appearances, she is a contributing writer and editor for Ed Slott's *IRA Advisor* newsletter and plays a key role in developing IRA course materials and training programs for financial professionals nationwide.

Sarah's educational background includes a degree from Smith College and a law degree from Villanova School of Law. She is a member of the Pennsylvania Bar and previously practiced law with a concentration in elder law. For fifteen years, she was a senior consultant with PMC, Pension Management Company, an independent IRA consulting firm serving financial organizations nationwide.

ANDY IVES, CFP®, AIF®

IRA Analyst

Andy Ives, CFP®, AIF®, brings 25 years of diverse experience in the financial services industry, ranging from managing client relationships to delivering expert-level IRA guidance. His depth of knowledge and engaging presentation style make him a highly sought-after speaker, particularly on the intricacies of IRA distribution planning. Andy is a core part of Ed Slott's Elite IRA Advisor Group℠ presentations both on stage and behind the scenes, where he provides in-depth education on advanced IRA strategies. He also regularly presents at *Ed Slott's 2-Day IRA Workshop, Instant IRA Success* and contributes to Ed Slott and Company's *IRA Success*, powered by The American College of Financial Services.

Andy's expertise has been widely recognized in the media, with frequent quotes in *The Wall Street Journal* and *USA Today*, as well as contributed articles for *TheStreet.com*. His consulting work with members of the Elite IRA Advisor Group allows him to stay attuned to the most pressing IRA concerns across the country, giving him unique insights into the pulse of the industry.

In addition to his speaking engagements, Andy is a featured expert on The American College's Knowledge Hub+ platform, where he offers practical guidance to financial professionals. Throughout his career, Andy has partnered closely with advisors, business owners, and plan sponsors, bringing a well-rounded perspective to retirement and financial planning.

Andy earned the CERTIFIED FINANCIAL PLANNER™ designation in 2008 and the Accredited Investment Fiduciary® (AIF®) designation in 2014. He has served as both a Board Member and past President of the North Florida Chapter of the Society of Financial Service Professionals.

IAN BERGER, JD

IRA Analyst

Ian Berger, JD, is an integral part of the team of America's IRA Experts, with over 30 years of experience advising on a wide array of ERISA and tax issues related to retirement plans. He is frequently quoted in *The Wall Street Journal* and *USA Today* and contributes articles to *TheStreet.com*. Ian is a knowledgeable technical resource and educator for Ed Slott's Elite IRA Advisor Group℠, a prestigious study group of top financial professionals, and regularly presents *at Ed Slott's 2-Day IRA Workshop, Instant IRA Success* and Ed Slott and Company's *IRA Success*, powered by The American College of Financial Services. He also serves as a featured Expert on The American College's Knowledge Hub+ platform.

During both virtual and in-person training sessions, Ian is known for his ability to provide precise, actionable guidance on complex IRA questions. Attendees are consistently impressed by the dual delivery method, where one Expert presents while Ian and team field a high volume of technical questions, showcasing their in-depth knowledge and mastery of the subject matter.

In his earlier career, Ian served as General Counsel to the City of Baltimore Retirement Systems, managing all legal matters for the City's Employees' Retirement System and Deferred Compensation Plan. He has also practiced law with Gordon Feinblatt and worked as a consulting attorney with Mercer Consulting.

Ian earned his B.A. from the University of Pennsylvania and his law degree from the New York University School of Law. He is a member of the Maryland Bar Association.

AMERICA'S IRA EXPERTS

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

WHAT ATTENDEES ARE SAYING:

"As anticipated Ed and his crew delivered the most complete treatment of the top issues practitioners are seeing in this area. The bifurcation of Ed speaking and his crew responding to participants' questions provides a model for efficient knowledge-sharing, which one could hope would be replicated in other arenas. Bravo!!!"
— Moshe Stepansky

"The four seasoned presenters keep it engaging, breaking down the technical details, highlighting pitfalls, and bringing it to life with real examples and IRS rulings. They also offer great ideas on how to apply the information to help clients, drawing from their extensive experience."
— Dixie Roberts

"Drop what you are doing when Ed Slott conducts a seminar. Very thorough, great presentation skills and informative...you will take home 'nuggets' every single time that you will implement in your practice and be a hero." —Barry Dreayer

"As a financial professional I rely on Ed's timely & thorough updates to bring the most value to my clients. He is hands down the best presenter on IRAs, Roths, and retirement planning tips. His blog, newsletter, and webinars are invaluable, and his delivery is always lively & engaging! Thank you, Ed! Keep rocking!!" —Angela Ruff

"Great webinar! The information provided could save my clients many thousands of dollars in tax!"
—Dean Duncan

"UNBELIEVABLE! All that expertise in one person?! WOW! I learned so much!" —Sheila Baugh

"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

"*Ed Slott packs so much information into his IRA webinar and considering recent legislation this was a very timely topic. Great insights explained extremely well."* — Anne Muldoon

"*Incredible! I consider myself an IRA Expert, but I always hope to find something beneficial in IRA webinars. Ed blew it out of the water—I left the webinar with lots of tips and some clarification I didn't know I needed. Fantastic job!!*" — Teresa Roman

"So much fast-paced, yet in-depth information that I never want to miss a minute of the presentations! The energy was outstanding, and the program was every bit as well done [virtually] as in-person programs have been." — Linda Gardner

*"**Truly outstanding presentation packed with useful information, which was informatively, thoughtfully, and enjoyably delivered. Ed Slott again lives up to his remarkable reputation."*** — Shunterica Woods

"Ed is a powerhouse presenter and a complete educator; I was on the edge of my seat for the entire hour! He delivered answers to all my burning questions and proactively answered my follow-up questions… ED, Exceptional-Dedicated!" — Marian Sterling

"Succinct and exceptionally instructive." — *Daniel Mannion*

"Ed Slott! Yes, THE Ed Slott! It doesn't get any better than this for fast-paced, informative webinars! Too bad instructor ratings only go up to 5. He's a 10!" — *Arnold Parise*

"Timely, accurate, important information." — Jerry Matecun

"Where else can we get developments up-to-the-minute?" — Mary Aheam

"There is NO OTHER PLACE you can get this information. No other place!!!" — Tom Mosley