



## BRING INFORMATIVE, ENTERTAINING AND ACTIONABLE TAX EDUCATION TO YOUR ORGANIZATION

Ed Slott frequently presents **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 & civic organizations

### ABOUT ED SLOTT, CPA

**Ed Slott, CPA, America's IRA Expert**, is a nationally recognized speaker, television personality & best-selling author known for his unparalleled ability to turn advanced tax strategies into understandable, actionable and entertaining advice.

Named "The Best Source for IRA Advice" by *The Wall Street Journal*, he is the go-to resource for media, regularly providing insight on breaking news affecting retirement and tax planning laws and strategies.

Mr. Slott is a Professor of Practice at The American College of Financial Services and has been recognized by leading industry organizations for his significant thought leadership and contributions. He is one of the top pledge drivers of all time with his popular public television specials, the creator of Ed Slott's Elite IRA Advisor Group<sup>SM</sup> and the best-selling author of *The New Retirement Savings Time Bomb: How to Take Financial Control, Avoid Unnecessary Taxes and Combat the Latest Threats to Your Retirement Savings* (Penguin Random House, 2021). 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.



**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](mailto:laurin@irahelp.com) to discuss pricing and planning.



Web: [irahelp.com](http://irahelp.com) • Email: [info@irahelp.com](mailto:info@irahelp.com) • Phone: **800-663-1340**

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## SIGNATURE SPEAKING TOPICS 2023 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.*

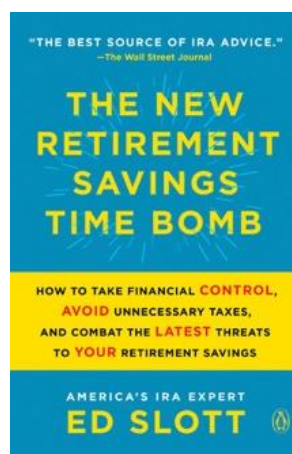
### Rethinking Retirement Tax Planning for 2023, and Beyond: Ed Slott's 3-Year Plan to Capitalize on Inflation and Taxes

Yes, inflation is a problem, but not when it comes to tax planning. It's a gigantic opportunity to help clients protect and save more of their retirement savings from future higher taxes than ever before! Show clients how to **take control** of future taxes. This keynote presentation features Ed Slott's best IRA and retirement tax planning strategies for 2023. Learn how to take advantage of these current inflation levels, the new tax rules, and alternative distribution strategies. You'll learn how to use Ed's 3-step plan to identify the clients who will benefit most from recent tax changes. **It's time to rethink and reverse traditional retirement planning strategies.** Learn how to develop these new practical planning ideas to showcase your expertise and increase your income.

### The New Retirement Savings Time Bomb: 5 Easy Steps to Help Clients Take Control, Avoid Unnecessary Taxes & Combat the Latest Threats to Their Retirement Savings

Taxes will be the single biggest factor that separates people from their retirement dreams. Americans have invested trillions of dollars in retirement plans, turning them into the biggest, most valuable assets they own—often worth more than even their homes. But these accounts also typically have a huge unpaid debt facing them at future tax rates upon distribution creating looming uncertainty about how much of your clients' hard-earned money they actually get to keep.

Help your clients protect the assets they've spent a lifetime building from excessive taxation with insights from Ed Slott's completely updated best-seller, *The New Retirement Savings Time Bomb* (Penguin Random House, 2021). Learn how to explain and disarm this ticking tax time bomb in 5 easy steps.



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By Ed Slott, CPA | Copyright © 2023



## 5 High-Value Retirement Tax Planning Conversations

Learn the actionable conversation tools you need to jump start your business goals! With ominous tax proposals hanging over the future taxation of your clients' retirement savings, what proactive planning strategies should you be discussing today to prepare? Join America's IRA Expert, Ed Slott, CPA, for his most timely insights to share with your clients, prospects, and centers of influence, including how to:

- Discuss estate planning after the SECURE Act – plans need updating immediately
- Determine how to advise on Roth conversions to eliminate the uncertainty of future, higher tax bills
- Identify life insurance planning moves after the SECURE Act eliminated the stretch IRA
- Assemble timely tax-efficient charitable planning strategies using qualified charitable distributions (QCDs)
- Evaluate 2023 RMD planning considerations using the new IRS tables

## Planning for the End of Stretch IRAs: Critical Planning Issues That Must Be Addressed for Large IRAs After the SECURE Act

The SECURE Act has eliminated the stretch IRA for many beneficiaries, and your clients will need solutions. *Every IRA and company plan is being affected.* The post-death payout rules could have a significant negative tax impact on the plans your clients have made for their retirement savings. Beneficiaries inheriting IRAs are now experiencing the implications of the end of the stretch IRA. This is where the rubber meets the road, and costly and irrevocable mistakes will be common!

The good news is that there are alternative solutions that can put clients' savings in a better position, providing larger inheritances, with more control and less tax. One of the better options is to use cash value life insurance in place of the traditional stretch IRA plan — *The Life Insurance Replacement Plan* — and that is the focus of this program. Annuities can also play an important role in retirement income planning. Learn how to explain the issues and the solutions to clients so that they will act and create better plans with you for their families.

## The Big Decision: Rollover, Stay Put or Withdraw?

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** — *especially now with mass layoffs and early retirements surrounding the pandemic.* 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



## Gift Strategies: Planning Lifetime Transfers

The golden age of gifting is here **now!** 2023 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 2023 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 2023 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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### **Financial Triage: Priority Action Plan for Helping Clients NOW**

In the medical profession, the term "triage" is used as a process to assign priority based on medical urgency. This program will show advisors how to take a similar methodical approach to help clients *now* who may be experiencing severe financial worry, either for themselves or their loved ones.

In a time that even the best-laid plans are being constantly upended, many financial professionals and clients alike are in a state of shellshock. Sickness, death, loss of income and the many other concerns surrounding a global pandemic have left many consumed by worry, feeling paralyzed and powerless. Financial advisors have an immediate call-to-action to be of service, collaborating with CPAs, attorneys, family members and key centers of influence to provide immediate value to clients with retirement accounts. In doing so, they will solidify their position as a valued advisor for years, decades and generations to come. Learn how to step up and go the extra mile for your clients, who will forever remember how you responded when they needed you the most.





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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 Group<sup>SM</sup>, 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, including Ed Slott's *Retirement Decisions Guide: 2023 Edition* (IRAHelp, 2023), *Fund Your Future: A Tax-Smart Savings Plan in Your 20s and 30s* (IRAHelp, 2021) and *The New Retirement Savings Time Bomb* (Penguin Random House, 2021). 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 regularly provides a Q&A column to AARP and 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.



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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](mailto: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](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/-liMY6OQLqk>



## 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:

***"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

***"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

***"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