

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*

- 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
- Retirement Plan Contribution Limits

Break**10:15 am – 10:45 am****Session Two****10:45 am – 12:00 noon***Stretch IRA / Beneficiary Forms / Custodial Document Checklist*

- 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
- 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 (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
 - 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 (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
 - 60-Day Rollover Relief
 - Roth IRA Beneficiaries Must Take RMDs
 - Correcting Excess IRA Contributions

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 / IRA Update*

- Roth IRA 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 Conversions from Company Plans
- Roth 401(k), Roth 403(b) and Roth 457(b) Contribution and Distribution Rules
- Risky Roth IRA Strategies to Avoid
- IRA Update: The Latest IRA Tax Law Changes, 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 / 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
- 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 Attract Large IRA Rollover Clients / Advising Clients on Key Rollover Decisions*

- How 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) Rulings from IRS

Break**2:45 pm – 3:15 pm****Session Four****3:15 pm – 5:00 pm***The Missing Estate Plan / IRA Estate Planning Strategies / Life Insurance Planning with IRAs / 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
- IRA Estate Planning Strategies
- How to Plan for Estate Tax Uncertainty
- Use of Life Insurance to Protect IRA Values
- IRA Strategies to Increase Your Insurance Sales
- How to Plan for State Estate Taxes
- 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

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