

DAY ONE

DAY TWO

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

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.