ED SLOTT AND COMPANY, LLC
America's IRA Experts

JOIN AMERICA'S IRA EXPERTS!


Ed Slott, CPA


Sarah Brenner, JD


Andy Ives, CFP®, AIF®


Ian Berger, JD

LIVE

Ed Slott and Company's

VIRTUAL

2-Day IRA Workshop

INSTANT IRA SUCCESS

Updated for the SECURE & CARES Acts

July 9-10, 2020

"This program, with its emphasis on the SECURE Act, empowered me to start immediate discussions with my clients today for a better tomorrow. I was reminded at this training that being complacent hurts a client. I strive for excellence by being up-to-date on new tax rules and strategies to make sure I am maximizing my clients' potential retirement and legacy for which they have worked so hard. They deserve it and should demand this because it's all about them. Fantastic education! Wonderful presentation!"
— Leticia Hewko, Tustin, CA

Download a 400+ Page Reference Manual!
"This manual is a goldmine!"
—Ken Friedman, Jacksonville Beach, FL

Is Your Company Up to Speed? Group Discounts Available

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To Register or Learn More **Visit:** irahelp.com/2-day **Call:** 800-663-1340 **Email:** info@irahelp.com

Join the retirement planning conversation

MASTER THE SECURE & CARES ACTS

The SECURE Act single-handedly upended many long-standing retirement rules on January 1, 2020. Only three months later, a second and equally enormous piece of legislation was passed—*the Coronavirus Aid, Relief, and Economic Security (CARES) Act.* From RMD waiver eligibility and age changes to Coronavirus-Related Distributions (CRDs), **are you prepared to answer your clients' questions and be a knowledgeable fiduciary in this new terrain?**

RECOGNIZE NEW BACK-DOOR ROTH OPPORTUNITIES

By repealing the maximum age for IRA contributions, more clients will be eligible to complete Roth conversions. However, with recharacterizations eliminated, knowledgeable expertise is more important than ever to avoid costly and irreversible mistakes!

RIP STRETCH IRAS

Congress has pulled the rug out from retirees late in the game—*especially those with large IRAs!* Join us to learn about a key new beneficiary category still eligible for stretch provisions and the **five new strategies** that you can use to give your clients post-death control and minimized taxes.

CRITICAL ANSWERS THAT YOU, YOUR CLIENTS & COMMUNITY NEED *NOW*

Now more than ever, obstacles and volatility are a constant variable: the stock market, interest rates, tax laws, political and regulatory environment surrounding a global pandemic and an election year.

How will history remember 2020? That is yet to be written and out of our control. How will your clients remember you and the actions you took during these trying times? It is said that crisis does not build character—*it reveals it.*

Empty claims of being a "retirement expert" will quickly end in costly mistakes for those unequipped with the latest knowledge and advice. Leading financial advisors, those who take the reins during one of the most difficult periods in recent American history, need to be knowledgeable on these significant tax laws and updates.

The urgency for knowledgeable, professional advice has never been more essential!

The most timely, up-to-the-minute IRA education

Since January 1, our team of IRA Experts has been flooded with questions from thousands of Americans— consumers, professionals and media alike—such as:

- Which retirement accounts are affected by the RMD waiver?
- Can an RMD already taken for 2020 be rolled over?
- Is the age for QCDs still 70 ½?
- Who is eligible for a Coronavirus-Related Distribution?

As news continues to break, this LIVE virtual training will prepare you to answer the top questions of your clients, prospects and centers of influence.

After two days, you will be armed with immediately actionable intel to help your clients maximize their hard-earned retirement savings.

Get focused. Get educated. Take action.

It all starts by spending two days with us, America's IRA Experts, at our VIRTUAL Instant IRA Success. Join us for:

- **The most-up-to-date IRA expertise,** including new opportunities and planning considerations stemming from the SECURE and CARES Acts
- **An action plan** to implement into your business immediately to protect your clients and prospects from avoidable (and costly) planning errors
- **A 400+ page manual** available for the first time ever in a digital format to use as a practical reference guide
- **Valuable CE credits**
- **Direct access to our team of IRA Experts** through a virtual Q&A chat experience to make sure you leave with no questions unanswered

WHAT ATTENDEES ARE SAYING...

"Outstanding 2 days of training! 40 years in the business and this was an eye-opening experience! What you don't know CAN hurt you."
— Chuck Price, Portland, OR

"Within the first 30 minutes of Ed's workshop, I realized I had made a common IRA planning mistake. I called my office and stopped a transaction saving my client tax on $136,000 and saving the relationship. This program paid for itself within the first hour I was here!"
— Jim Flanagan, Naperville, FL

"The emphasis on the SECURE Act was critical. No amount of self-study could prepare me as well as the Slott team!"
— Scott Dewhurst, New York, NY

"I was able to show a prospect (now client) how to save $52,000 on their RMDs from the material at this training! Their CPA loved it and so did the client."
— Larry Schuffman, Pensacola, FL

"Without this course, any professional advising clients on IRAs could make costly, in some cases savings-crushing, mistakes."
— Lisa Barram, Fort Washington, PA

"Ed Slott and Company's 2-Day IRA Workshop not only provided detailed explanations and illustrations of the latest updates from the SECURE Act, but the experts were dynamic, engaging and provided key ideas to help pre- and post-retirees maximize tax favorable treatment! I learned many valuable ideas to help my current and future clients. The education is top notch!"
— Maria Muth, Somerville, NJ

2 days of educational and empowering IRA strategies

DAY ONE

IMPORTANT: All sessions are shown in **Eastern Time.** Sessions begin at 10 EDT / 9 CDT / 8 MDT / 7 PDT in the morning and end at 5:10 EDT / 4:10 CDT / 3:10 MDT / 2:10 PDT in the afternoon on both days. To receive CE credits, you must be in attendance for the entire workshop on **both days.**

Session One — **10:00 am – 10:50 am EDT**

Navigating the CARES Act

- Introduction and Program Overview
- CARES Act Relief Provisions
- 2020 RMD Waiver
- Coronavirus-Related Distributions (CRDs)
- Plan loan relief

Break — **10:50 am – 11:00 am EDT**

Session Two — **11:00 am – 11:50 am EDT**

SECURE Act / Planning for the End of the Stretch IRA /3 Beneficiary Categories / Eligible Designated Beneficiaries (EDBs) – Who Qualifies?

- SECURE Act – Summary of Key Changes
- The End of the Stretch IRA – SECURE Act Planning Solutions
- 3 Beneficiary Categories under the SECURE Act
- Eligible Designated Beneficiaries (EDBs) – Who Qualifies?

Break — **11:50 am – 12:40 pm EDT**

Session Three — **12:40 pm – 1:30 pm EDT**

SECURE Act Impact on Stretch IRAs / How Post-Death Payout Rules Will Work / Practice Examples / Beneficiary Forms / Custodial Document Checklist

- SECURE Act - How post-death payouts will work
- Practice Examples – Post-death payouts based on the type of beneficiary
- Why Most Beneficiaries Overpay Their Taxes
- Common Mistakes in Setting up Inherited 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

Break — **1:30 pm – 1:40 pm EDT**

Session Four — **1:40 pm – 2:30 pm EDT**

25 IRA Rules You Must Know (Part One)

- 25 IRA Rules You Must Know and How to Capitalize on Them, Including New Rules Under the SECURE Act (Part One)

Highlights Include:

- IRA Distribution Basics
- Aggregating Distributions
- 5-Year Rule Confusion After Death
- SEP and SIMPLE IRA Confusion
- Creditor/bankruptcy protection of IRAs
- Year of Death Distribution - Who Takes It?
- IRAs Don't Generally Pass Through Wills

Break — **2:30 pm – 3:20 pm EDT**

Session Five — **3:20 pm – 4:10 pm EDT**

25 IRA Rules You Must Know (Part Two)

- 25 IRA Rules You Must Know and How to Capitalize on Them, Including New Rules Under the SECURE Act (Part Two)

Highlights Include:

- 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 — **4:10 pm – 4:20 pm EDT**

Session Six — **4:20 pm – 5:10 pm EDT**

25 IRA Rules You Must Know (Part Three)

- 25 IRA Rules You Must Know and How to Capitalize on Them, Including New Rules Under the SECURE Act (Part Three)

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
- Rollover or Transfer? – 60-Day Rollover Relief
- Roth IRA Beneficiaries Must Take RMDs
- Correcting Excess IRA Contributions

DAY TWO

Session Seven — **10:00 am – 10:50 am EDT**

Roth Conversion Planning / 3 Roth Conversion Questions You Need to Ask / Estate Planning with Roth IRAs

- Roth IRA Tax Planning After the SECURE Act
- The 3 Questions to Ask in Every Roth Conversion Evaluation
- Who Should and Who Should Not Convert
- Estate Planning with Roth IRAs

Break — **10:50 am – 11:00 am EDT**

Session Eight — **11:00 am – 11:50 am EDT**

Roth 401(k) Rules / IRA Update – The Latest IRA Changes, Rulings and Cases

- Roth Conversions from Company Plans
- Roth 401(k), Roth 403(b), and Roth 457(b) Contribution and Distribution Rules
- IRA Update: The Latest IRA Tax Law Changes Including the SECURE Act, New Tax Strategies, Rulings, Court Cases and Planning Opportunities

Break — **11:50 am – 12:40 pm EDT**

Session Nine — **12:40 pm – 1:30 pm EDT**

Naming Trusts as IRA Beneficiaries (Part One)
Everything You Need to Know / SECURE Act Effect on IRA Trust Planning

- Separate Account Rules for Multiple IRA Beneficiaries - Splitting IRAs
- Naming Trusts as IRA Beneficiaries – The SECURE Act Impact and Why Most IRA Trusts Won't Work Anymore!

Break — **1:30 pm – 1:40 pm EDT**

Session Ten — **1:40 pm – 2:30 pm EDT**

Naming Trusts as IRA Beneficiaries (Part Two)
SECURE Act Effect on IRA Trust Planning / Latest IRA Trust Rulings and Planning Strategies / IRA Trust Checklist

- SECURE Act Effect on IRA Trust Planning
- 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

Break — **2:30 pm – 3:20 pm EDT**

Session Eleven — **3:20 pm – 4:10 pm EDT**

How to Use the SECURE Act to Attract Large IRA Rollover Clients / Advising Clients on Key Rollover Decisions / 72(t) Planning

- How to Use the SECURE Act to Attract Large IRA Rollover Clients
- Advising Clients on Key Rollover Decisions
- NUA (Net Unrealized Appreciation) 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) IRS Rulings and Court Cases

Break — **4:10 pm – 4:20 pm EDT**

Session Twelve — **4:20 pm – 5:10 pm EDT**

The Missing Estate Plan / IRA Estate Planning Strategies After the SECURE Act / Life Insurance Planning with IRAs

- The Missing IRA Estate Plan...Means More Money for YOU
- IRA Estate Planning Strategies – New Strategies After the SECURE Act
- How to Plan for Estate Tax Uncertainty
- Use of Life Insurance to Protect IRA Values – SECURE Act Impact
- IRA Strategies to Increase Your Insurance and Annuity Sales
- Planning for State Estate Taxes
- The 2 Biggest Tax Breaks in the Tax Code and How to Make Sure Your Clients Get Them - Creating the Perfect IRA Estate Plan

YES! **Please register me for Ed Slott and Company's Virtual 2-Day IRA Workshop: Instant IRA Success**

Registration Form – July 9-10, 2020, Virtual

Register online at irahelp.com/2-day

You may also call, fax, or email us using the information at the bottom of this page. If paying by check, please mail it to Ed Slott and Company, LLC at 100 Merrick Road, Suite 200E, Rockville Centre, NY 11570

☐ Single Payment of $1995

Register at **IRAhelp.com/2-day**

PARTICIPANTS WILL EARN 12 CPE CREDITS
FIELD OF STUDY: TAXES
PREREQUISITES & ADVANCED PREPARATION: NONE
PROGRAM LEVEL: BEGINNER
DELIVERY METHOD: GROUP INTERNET BASED

ATTENDEE INFORMATION **Attendee Registration Fee $1995**

First Name* Last Name*

Company

Job Title*

Address 1*

Address 2

City* State* Zip Code*

Phone* Cell Phone* Fax

Email* Promo Code

How Did You Learn About This Workshop?

PAYMENT INFORMATION

Please charge the registration fee to my: ☐ Visa ☐ MC ☐ Discover ☐ Amex ☐ Gift Card

CC Account # Exp. Date

Name on Card CCV #

Number of Attendees:	Price per Attendee:
1	$1995
2	$1595
3-9	$1495
10+	$1295

This workshop will be broadcast using Zoom. Once registered, you will receive a link to join the event via email the week of the event.

**Discount codes and group rates cannot be combined*

Ed Slott and Company has a "no refund" policy. In the event of cancellation, your payment will be transferred to the next 2-Day IRA Workshop or eSeminar. For more information regarding refund, concerns and program cancellation policies, please contact our offices at 800-663-1340. Ed Slott and Company is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

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