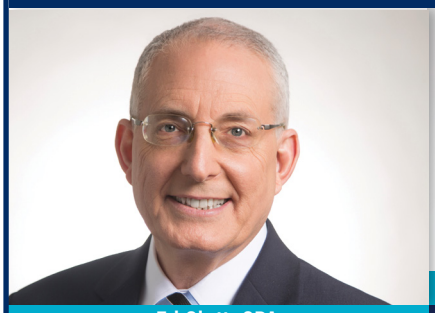
ED SLOTT AND COMPANY, LLC
America's IRA Experts

JOIN AMERICA'S IRA EXPERTS!


Ed Slott, CPA

Sarah Brenner, JD

Andy Ives, CFP®, AIF®

Ian Berger, JD

Ed Slott and Company's Exclusive 2-Day IRA Workshop

INSTANT IRA SUCCESS

FEBRUARY 24-25, 2023 | CAESARS PALACE | LAS VEGAS

Featuring the latest retirement tax law changes, including the SECURE Act and new 2022 RMD rules from IRS *in effect now!*

"What makes this workshop different? Ed Slott and Company takes potentially dry information and manages to make it exciting.
How? UPDATES (emphasis on new tax law changes). This makes the information timely and fresh.
OPPORTUNITIES (highlighting who might be affected and what to do). This makes the information extremely relevant.
HUMOR (personal stories, case studies, video clips). This makes the information human."
– Laura Redfern, CFP®, Austin, TX

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

Is Your Company Up to Speed? Group Discounts Available

CE Credits Available

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 ACT

The SECURE Act single-handedly upended many long-standing retirement rules on January 1, 2020—*particularly impacting those with large IRAs!* With the IRS release of 275 pages of new RMD tax rules in February 2022, learn the latest strategies you can use to give your clients minimized taxes and post-death control of their assets.

PROVIDE BEST INTEREST ADVICE

From the SEC Reg BI to various state departments continuing to advance best interest standards and documentation procedures, most financial advisors are not prepared to help clients with rollover decisions—*especially now with mass layoffs due to the pandemic!* Learn the exact process you need in order to act as a fiduciary advising on rollover decisions.

GAIN EXCLUSIVE KNOWLEDGE & ACCESS

Get direct access to America's IRA Experts as Ed Slott's latest book, *The New Retirement Savings Time Bomb*, tops bestseller charts! You will have the latest training and strategies at your fingertips to have high-value conversations with your key contacts.

HELP YOUR CLIENTS TAKE FINANCIAL **CONTROL, AVOID** UNNECESSARY TAXES AND **COMBAT** THE LATEST THREATS TO THEIR RETIREMENT SAVINGS

Obstacles and volatility facing retirement accounts are constant variables, and they are continuing to snowball with exponential speed and complexity! The stock market, interest rates, tax laws, and the political and regulatory environment surrounding a global pandemic and best interest legislation, just to name a few, are a ticking time bomb!

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!

Help your clients have more, keep more and make it last with up-to-the-minute IRA education!

The SECURE Act took effect in 2020, creating three categories of beneficiaries and requiring urgent planning updates surrounding the end of the stretch IRA. Beneficiaries who inherited accounts before 2020 are still subject to old rules, and now, with new life expectancy tables and extensive IRS RMD regulations released in February 2022, your clients have more questions than ever! Our team of IRA Experts has been flooded with questions from thousands of Americans—*consumers, professionals and media alike.*

As news continues to break, this live training will prepare you to answer the top questions from 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.

Join America's IRA Experts to take advantage of timely planning strategies, including:

- **The most-up-to-date IRA expertise,** including new opportunities and planning considerations stemming from the SECURE Act and new RMD regulations released in 2022
- **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** to take home and use as a practical reference guide
- **Continuing education credits**
- **Built-in networking** and Q&A time

WHAT ATTENDEES ARE SAYING ABOUT TRAINING WITH AMERICA'S IRA EXPERTS

"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

"In two days, Ed Slott and his team give a solid IRA education. The program starts on Day 1 with information basic enough for someone new to follow, but not so remedial that more experienced participants will be bored. Day 2 has the more complex rules and planning suggestions. The program is so complete I feel more confidant about the advice I give, and I know where to look for help. The silly humor makes their message more memorable."
— Susan Willey, CPA, Boston, MA

"Where else can we get developments up-to-the-minute?"
— Mary Ahearn, Tucson, AZ

"Easily the BEST CPE I've taken! Very informative, engaging, and interesting. Ed and his IRA Experts are Rock Stars!!"
— Mina Akita, Raleigh, NC

"Ed's energy and enthusiasm are only exceeded by his knowledge of the subject matter, great presentation!!"
—Kevin Campisano, Louisville, KY

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2 days of educational and empowering IRA strategies

DAY ONE

Breakfast / Registration — **8:00 AM — 8:45 AM**

Session One — **8:45 AM — 10:00 AM**

Navigating the SECURE Act / Planning for the End of the Stretch IRA / 3 Beneficiary Categories / Eligible Designated Beneficiaries (EDBs)

- Introduction and Program Overview
- Retirement Plan Contribution Limits
- RMDs After the SECURE Act and What the New IRS RMD Rules Mean for Beneficiaries
- RMDs with the New IRS Life Expectancy Tables
- 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 — **10:00 AM — 10:15 AM**

Session Two — **10:15 AM — 11:15 AM**

SECURE Act Impact on Stretch IRAs / How Post-Death Payout Rules Will Work / Practice Examples

- SECURE Act - How post-death payouts will work
- Application of the 10-year payout rule
- Practice Examples – Post-death payouts based on the type of beneficiary

Break — **11:15 AM — 11:30 AM**

Session Three — **11:30 AM — 12:30 PM**

Beneficiary Forms / IRA Beneficiary Selection / Setting Up Inherited IRAs / Custodial Document Checklist

- 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

Lunch Break — **12:30 PM — 1:30 PM**

Session Four — **1:30 PM — 2:30 PM**

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 — 2:45 PM**

Session Five — **2:45 PM — 3:45 PM**

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 — **3:45 PM — 4:00 PM**

Session Six — **4:00 PM — 5:00 PM**

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

The workshop will take place at Caesars Palace

Breakfast — **7:30 AM — 9:00 AM**

Optional Session — **8:00 AM — 8:45 AM**

Learn More About Ed Slott's Elite IRA Advisor Group℠

Session Seven — **9:00 AM — 10:00 AM**

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 — **10:00 AM — 10:15 AM**

Session Eight — **10:15 AM — 11:15 AM**

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 — **11:15 AM — 11:30 AM**

Session Nine — **11:30 AM — 12:30 PM**

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!

Lunch Break — **12:30 PM — 1:30 PM**

Session Ten — **1:30 PM — 2:30 PM**

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 — 2:45 PM**

Session Eleven — **2:45 PM — 3:45 PM**

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 — **3:45 PM — 4:00 PM**

Session Twelve — **4:00 PM — 5:00 PM**

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

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YES! PLEASE REGISTER ME FOR:

Ed Slott and Company's Exclusive 2-Day IRA Workshop, *Instant IRA Success*
February 24-25, 2023

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

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10 CREDITS: SD
3 CREDITS: WA

Please check irahelp.com for the types of insurance credits offered

*There are no prerequisites or advanced preparation required for this workshop. The program level is beginner. 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.
**IRS – course is approved for Enrolled Agents (EA) and Return Preparers (OTRP) for (Federal Tax Law / Federal Tax Related)
NY – course is approved for Life Brokers (LB), Life Consultants (C1), Life Settlement Brokers (LSB), and Life/Accident and Health Agents (LA)
Group Live Workshop

CE credits are subject to change.

IMPORTANT: To receive CE credits, you must be present for the entire workshop on both days. No exceptions.

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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

Discount codes and group rates cannot be combined

WOULD YOU LIKE TO STAY AT CAESARS PALACE FOR AN ADDITIONAL $219 PER NIGHT?

NUMBER OF ROOMS: ☐

YOU MUST RESERVE YOUR ROOM BY JANUARY 31, 2023 TO RECEIVE THE DISCOUNTED RATE.

FOR THE NIGHTS OF:

Thurs & Fri Feb 23-24	Thurs, Fri & Sat Feb 23-25
☐	☐

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.
For more information regarding refunds, concerns and program cancellation policies, please contact our offices at 800-663-1340.

irahelp.com/2-day Tel: 800-663-1340 Fax: 516-536-8852 Email: info@irahelp.com

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