AMERICA'S IRA EXPERTS

DO YOU KNOW THE #1 MOST IN-DEMAND SERVICE FOR RETIREMENT SAVERS TODAY?

A recent *Herbers & Company* survey found that tax planning is the top service valued by clients with $250k+ in assets—yet most say they're not getting it.

97% of the fastest-growing advisory firms offer tax planning, compared with just 49% of others. With the One Big Beautiful Bill Act reshaping key provisions of the Tax Cuts and Jobs Act and trillions in retirement assets now entering distribution, 2026 is a defining moment for advisors and consumers to secure lower taxes and stronger retirements.

BRING INFORMATIVE, ENTERTAINING AND ACTIONABLE TAX EDUCATION TO YOUR NEXT EVENT

Ed Slott and his team of America's IRA Experts frequently present **1-2-hour keynote presentations,** as well as **extended training courses—**live or virtual— providing the most up-to-date education available anywhere for:

- Financial advisors
- Insurance professionals
- CPAs
- Enrolled Agents
- Tax attorneys
- Financial institutions, organizations & membership groups
- Professionals seeking tax-smart planning mastery
- Clients, consumers & civic organizations

ED SLOTT AND COMPANY, LLC
America's IRA Experts
Web: irahelp.com · Email: info@irahelp.com · Phone: 800-663-1340
X: @theslottreport · Facebook: AmericasIRAExperts · LinkedIn: Ed Slott and Company · YouTube: EdSlottandCompanyIRA

POPULAR EVENT FORMATS
AVAILABLE BOTH LIVE & VIRTUAL

Advisor Training Programs (1–2 Hours)

Attract top advisors and elevate your organization's value. Ed Slott and his team deliver high-impact sessions that fill the room with professionals committed to:
• Upholding ethical and educational excellence
• Acting in clients' best interests through holistic, tax-efficient planning
• Serving high-net-worth and high-income clients

Top Advisor Client Workshops (1 Hour)

Differentiate your firm by hosting a consumer event with America's IRA Expert**.** Whether live or virtual, Ed's sessions inspire immediate action—helping clients recognize new opportunities in Roth conversions, lifetime income planning, life insurance, and tax-advantaged strategies**.** As an objective, nationally recognized CPA, he brings authority and trust that motivate clients to act—guided by their financial advisor.

Referral Relationship Builder (1–2 Hours)

Strengthen alliances with CPAs, attorneys, and other professionals by offering continuing-education programs led by America's IRA Experts. These events position your firm as the hub for timely, credible education—creating lasting, mutually beneficial referral relationships.

IRA Leadership Program (1½-Day Workshop)

A customizable corporate training experience for financial institutions and their advisors who want to:
• Make education a core revenue driver
• Expand relationships and client bases through advanced IRA strategies
• Master the latest tax and retirement distribution rules to become recognized IRA authorities

Program Features:

• Tailored content with up-to-the-minute legislative updates
• CE / CPE-eligible curriculum
• Interactive Q&A with America's IRA Experts—live or virtual
• Optional polling and engagement tools (subject to hosting platform capabilities)

BOOK ED SLOTT & HIS TEAM

Get started now! Contact Laurin Levine at **(516) 536-8282** or email **laurin@irahelp.com** to discuss pricing and planning.

AMERICA'S IRA EXPERTS

SIGNATURE SPEAKING TOPICS 2026
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.

Ed Slott's 2026 Retirement Tax Playbook

Turning OBBBA into One Big Beautiful Opportunity:
How Proactive Planning Can Permanently Lower Lifetime Taxes

America's IRA Expert, Ed Slott, CPA, delivers a dynamic, advisor-focused presentation for today's evolving tax environment. The SECURE Act, SECURE 2.0, and the One Big Beautiful Bill Act (OBBBA) have collided to create the most sweeping retirement and tax reset in decades. Together they redefine how Americans save, distribute, and transfer wealth. The SECURE Acts dismantled the stretch IRA and rewired legacy planning, while OBBBA locks in lower tax rates and reshapes deductions, thresholds, and QBI limits. It's a rare convergence that brings clarity, not comfort—*because even permanent law is written in pencil.*

This session goes beyond the headlines. It provides a real-time roadmap through this trifecta of legislation and the latest IRS rulings, showing advisors how to turn new law into lasting opportunity. The SECURE Act (2019) ended the stretch IRA and replaced it with the 10-year rule, making Roth IRAs and life insurance the new cornerstones of legacy planning. Its ripple effects continue through SECURE 2.0 and OBBBA. From Roth conversions to estate strategies, Ed reveals how today's decisions can permanently lower lifetime taxes for clients.

Why It Matters Now

- **Certainty meets strategy.** OBBBA locks in today's lower rates but reshapes deductions, thresholds, and QBI limits—creating new opportunities for proactive tax planning.
- **A record retirement wave is here.** More than 4 million Americans turn 65 each year through 2027, creating unprecedented demand for tax-smart planning.
- **Spouses inherit first.** $54 trillion will shift primarily to women before assets reach heirs—making survivor and spousal tax strategy the defining advisor opportunity of the decade.
- **Timing is everything.** 2026 is the window to convert, restructure, and secure lifetime tax control before the next policy turn. *The law may be permanent, but complacency is costly.*

Key Takeaways

- **The 2026 Tax Opportunity Map** — where OBBBA opens hidden advantages for bracket management and deduction timing.
- **The "Ignore RMDs" Advantage** — how to turn required distributions into voluntary, tax-smart strategy.
- **Next-Gen Estate Planning** — using Roth conversions, life insurance, and charitable tools to create lasting tax efficiency under the SECURE Acts.
- **Advisor Action Plan** — practical steps to strengthen trust, retention, and tax-smart growth in 2026 and beyond.

Why Advisors Attend

- Learn to turn permanent law into permanent value.
- Gain actionable talking points that drive confident client conversations.
- Position your firm as the go-to authority for tax-smart retirement income planning.

The rules have changed. The opportunity is clear. Complacency is costly. The advisors who master this playbook will define the next decade of retirement planning.

The Big Decision: Roll Over, Stay Put or Withdraw?

Frequent job changes and workplace reductions are making rollover decisions more common than ever. Meanwhile, evolving regulatory and fiduciary scrutiny only increases the stakes for advisors to guide clients carefully.

In this session, you'll get the clear, tax-first framework to advise confidently:

- 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

Gifting Strategies: Plan High-Value Lifetime Transfers

The window for lifetime wealth transfers is wide open, for now. But this could change with future tax legislation. With historically high gift and estate tax exemptions still in effect under OBBBA and estate challenges created by the SECURE Act's end of the stretch IRA, 2026 offers a rare chance to lock in multi-million-dollar savings now.

This advanced session breaks down the math of gifting and shows how even taxable gifts can produce lasting tax savings. It's designed for families who want straightforward, high-impact ways to move assets to the next generation without unnecessary complexity.

- **Use today's exemptions to remove millions** from future estate taxation.
- **Replace lost IRA stretch benefits** with lifetime gifts and Roth conversions.
- **Capture remaining business-succession opportunities**
- **Lock in gifts confidently.** The IRS has confirmed the "use it or lose it" rule.
- **Balance generosity and control** through smart structures and documentation.

2026 is the year to act. Turn today's temporary exemptions into one of the most powerful, time-sensitive tax-saving opportunities in decades.

The Opportunity Boom: 7 Game-Changing Trends Advisors Can't Afford to Miss

With more than $45 trillion in retirement assets and the largest wave of Americans ever turning 65**,** 2026 marks a defining moment for financial advisors. The SECURE Act, SECURE 2.0, and OBBBA have redrawn the retirement landscape. Advisors who master their combined impact will own the next decade.

• **Capturing their share of the expanding retirement marketplace** driven by record rollovers and withdrawals
• **Aligning services with the lifetime tax and income planning needs** of high-net-worth families
• **Positioning ahead of the next policy cycle** as Washington debates future tax and estate thresholds

2026 isn't business as usual—it's the inflection point. Advisors who evolve with these trends will define the next generation of trusted retirement professionals.

Projecting Tax on Roth Conversions

Avoid costly surprises with this practical guide to calculating the real tax impact of a Roth conversion. Roth IRAs remain one of the most powerful long-term tax tools, but accurate projections are critical now that OBBBA has made TCJA's lower brackets permanent and the SECURE Act has accelerated taxation on inherited IRAs**.**

With no recharacterizations or do-overs, precision matters more than ever.

You'll learn:
• **Key factors to include** in every Roth conversion tax projection
• **Five common misconceptions** that distort tax outcomes
• **Timing opportunities and traps** to watch before converting
• **Why "opportunity cost" objections no longer hold** under today's rate structure
• **How to use deductions strategically** to offset conversion income
• **The latest IRS and SECURE 2.0 updates** shaping Roth strategies in 2026

The math is clear: proactive conversions now can secure lifetime tax control.

Ed Slott's Best Year-End Strategies: Retirement Tax Planning

The last weeks of the year create a powerful window for advisors to help clients lock in savings and strengthen relationships before year-end. **America's IRA Expert, Ed Slott, CPA**, shares his top actionable strategies for maximizing tax benefits and preparing for the year ahead.

You'll learn how to:
• **Use year-end Roth conversions** to secure today's lower rates and reduce future tax exposure
• **Leverage the NUA tax break** to turn ordinary income into long-term capital gains on company stock
• **Apply last-minute charitable moves** such as **qualified charitable distributions (QCDs)**
• **Incorporate life insurance planning** now that the **stretch IRA is gone** under SECURE and SECURE 2.0
• **Lock in high gift and estate exemptions** while they last under OBBBA
• **Update estate and beneficiary plans** for SECURE 2.0 compliance and post-OBBBA opportunities

Whether presented at the close of 2025 or 2026, this session equips advisors with timely, high-impact strategies to deliver measurable tax savings before the clock runs out.

The Spouse Is the Beneficiary: What Every Advisor Must Know About the $54 Trillion "Horizontal" Wealth Transfer

Most advisors focus on children and grandchildren when planning for inherited IRAs, but in reality, the spouse inherits first. Over the next two decades, an estimated $54 trillion will transfer between spouses before any of it reaches the next generation. For advisors, this overlooked stage is where the most important planning happens — and where the biggest mistakes occur.

Attendees will learn how to:
• Apply the special tax rules for spousal beneficiaries
• Anticipate the "widow's penalty" and the tax impact of moving from joint to single filing
• Use Roth conversions, life insurance, and beneficiary updates to preserve family wealth across both lifetimes
• Identify when to retitle, disclaim, or defer inherited retirement accounts for maximum tax efficiency

AMERICA'S IRA EXPERTS

CONSUMER PROGRAM
AVAILABLE BOTH LIVE & VIRTUAL

Your Plan, *NOT* the Government Plan

Retirement Planning in 2026: Move Your Retirement Funds from Forever Taxed to Never Taxed

"Taxes will be the single biggest factor that separates people from their retirement dreams."
– Ed Slott

New Retirement Tax Changes and Tax Savings Opportunities

The SECURE Act, SECURE 2.0, and OBBBA have redefined how retirees plan withdrawals, Roth conversions, and legacy transfers. These rules impact every saver with an IRA, 401(k), or similar plan.

This entertaining, easy-to-follow program shows how to build a plan that reduces or eliminates the heavy tax burden on retirement distributions using Roth conversions, life insurance strategies, and smart income planning. Plus, learn the 3 biggest retirement risks and how to avoid them with proper planning.

Highlights include:

• **New tax laws effective NOW** and how you can benefit under the SECURE Acts and OBBBA

• ***Is your IRA an IOU to the IRS?*** How to ensure Uncle Sam is not your primary beneficiary

• **The single biggest benefit in the tax code** and how to make it work for you!

• **Volatile stock markets and your retirement** — *planning measures you can take*

• **Income planning** — *why guaranteed income is even more important than assets in retirement*

It's how much you **keep after taxes** that counts—and Ed Slott**,** America's IRA Expert, shows you how to keep more and pay less. Combining decades of tax knowledge with humor and real-world examples, Ed delivers an empowering and eye-opening experience that leaves audiences ready to act.

AMERICA'S IRA EXPERTS

CHARITY / NON-PROFIT PROGRAM

Educate and inspire your donors with timely gifting strategies from America's IRA Expert!
Bring Ed Slott and his team 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 and direct more of your life savings to your chosen charities? IRAs and other retirement accounts remain the most tax-efficient assets to give—and under the SECURE Act, SECURE 2.0 and OBBBA, the rules have evolved again. With the elimination of the stretch IRA, strategies such as charitable remainder trusts (CRTs) and qualified charitable distributions (QCDs) have become more valuable than ever for donors who want to blend philanthropy with smart tax planning.

Attendees will learn the **latest charitable planning opportunities** that can:
• Reduce lifetime and estate taxes through **strategic IRA giving**
• Use **CRTs or QCDs** to replicate stretch IRA benefits
• Leave **more to family, more to charity, and less to the IRS**
• Create **sustainable giving strategies** that can benefit organizations for decades to come

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

AMERICA'S IRA EXPERTS

Ed Slott, CPA, 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. *The Wall Street Journal* named him "The Best Source for IRA Advice," 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 IRA and retirement tax expertise for financial advisors, institutions, consumers, and media, he provides:

1. Advanced training for financial professionals to become recognized leaders in the retirement marketplace.
2. Practical, easy-to-understand education for retirement savers on IRA, tax, and financial planning topics.

Mr. Slott is a **Professor of Practice at The American College of Financial Services** and regularly delivers keynote presentations on IRA and estate planning strategies at both consumer and professional events, including virtual conferences reaching thousands nationwide.

Among his most popular resources are his advanced training programs for financial professionals. He is the creator of Ed Slott's Elite IRA Advisor Group℠, a network of more than 500 of the nation's top financial professionals who attend his ongoing education programs to stay current on the latest retirement and tax law changes. Ed Slott and Company also produces the 2-Day IRA Workshop (live and virtual) and the IRA Success 12-course on-demand CE program powered by The American College of Financial Services.

Mr. Slott is the author of numerous best-selling books, including *The Retirement Savings Time Bomb Ticks Louder* (Penguin Random House, 2024). He also publishes Ed Slott's IRA Advisor, a monthly newsletter for financial professionals, and serves as editor-in-chief of Keep More Quarterly, Ed Slott and Company's consumer retirement tax newsletter offering practical strategies to reduce taxes and avoid costly mistakes. He hosts irahelp.com, home to The Slott Report blog followed by tens of thousands of readers. His podcast, *The Great Retirement Debate*, co-hosted with Jeffrey Levine, CPA/PFS, CFP®, explores both sides of today's most pressing retirement planning strategies.

He has reached millions of consumers through his educational programs, including *Ed Slott's Retirement Freedom!* (2022**)** and the new direct-to-consumer digital campaign, *Ed Slott and Company's Ultimate Retirement Tax-Saving Roadmap* (2025)**—**a national initiative designed to help retirement savers understand how proactive tax planning can protect and preserve more of their lifetime savings.

Mr. Slott has been featured in *The New York Times*, *The Wall Street Journal*, *Forbes*, *USA Today*, *Kiplinger*, *Investor's Business Daily*, *Financial Advisor*, and *InvestmentNews*, and has appeared on NBC, ABC, CBS, CNBC, CNN, FOX, NPR, Bloomberg, and Morningstar.

He has been recognized as an ***InvestmentNews* Innovator**, ***ThinkAdvisor* Luminary**, and recipient of the **AICPA Sidney Kess Award for Excellence in Continuing Education**, among other industry honors.

Through his writing, teaching, and national media platforms, **Ed Slott has taught millions of Americans—and their advisors—how to keep more of their retirement savings through proactive tax planning.**

SARAH BRENNER, JD

Director of Retirement Education

Sarah Brenner, JD, is a leading authority on IRA distribution planning with over twenty years of experience helping clients and financial professionals navigate complex technical IRA questions. Known for her engaging presentation style, Sarah skillfully uses clever pop culture anecdotes to make advanced IRA education both memorable and accessible. Her ability to demystify complicated retirement laws has made her a sought-after speaker at financial industry events and private trainings for professionals, including advisors, CPAs, and attorneys.

Sarah regularly presents to Ed Slott's Elite IRA Advisor Group[SM], a prestigious study group of top financial professionals, as well as at Ed Slott's 2-Day IRA Workshop and Ed Slott and Company's *IRA Success*, powered by The American College of Financial Services. In these sessions, she provides expert guidance on the complexities of IRA distribution planning, making her a trusted resource in the financial community. As part of her work with the study group, Sarah consults directly with clients of member advisors, gaining firsthand understanding of thousands of Americans' top IRA questions each year. This unique exposure provides her with key insights and perspective on the pulse of IRA concerns across the country. Sarah is also a featured Expert on The American College's Knowledge Hub+ platform. She appears in Ed Slott and Company's *The Ultimate Retirement Tax-Saving Roadmap*—a national education campaign helping retirement savers understand how proactive tax planning can protect and preserve their savings.

Her expertise has been widely recognized in the media, where she has been frequently quoted by *The Wall Street Journal* and *USA Today*, and she has contributed articles to *TheStreet.com*. She is also a contributing writer and editor for Ed Slott's IRA Advisor newsletter, where she helps translate complex tax law into practical planning strategies for financial professionals nationwide, and a contributing editor to Keep More Quarterly, Ed Slott and Company's consumer retirement tax newsletter offering practical strategies to reduce taxes and avoid costly mistakes. In addition, she plays a key role in developing IRA course materials and training programs used by advisors across the country.

Sarah's educational background includes a degree from Smith College and a law degree from Villanova School of Law. She is a member of the Pennsylvania Bar and previously practiced law with a concentration in elder law. For fifteen years, she was a senior consultant with PMC, Pension Management Company, an independent IRA consulting firm serving financial organizations nationwide.

ANDY IVES, CFP®, AIF®
IRA Analyst

Andy Ives, CFP®, AIF®, brings 25 years of diverse experience in the financial services industry, ranging from managing client relationships to delivering expert-level IRA guidance. His depth of knowledge and engaging presentation style make him a highly sought-after speaker, particularly on the intricacies of IRA distribution planning. Andy is a core part of Ed Slott's Elite IRA Advisor Group℠ presentations both on stage and behind the scenes, where he provides in-depth education on advanced IRA strategies. He also regularly presents at Ed Slott's 2-Day IRA Workshop and contributes to Ed Slott and Company's *IRA Success*, powered by The American College of Financial Services.

He appears in Ed Slott and Company's *The Ultimate Retirement Tax-Saving Roadmap*—a national education campaign helping retirement savers understand how proactive tax planning can protect and preserve their savings.

Andy's expertise has been widely recognized in the media, with frequent quotes in *The Wall Street Journal* and *USA Today*, and contributed articles for *TheStreet.com*. He is also a contributing writer and editor for Ed Slott's IRA Advisor newsletter, where he helps translate complex retirement tax rules into practical, advisor-ready strategies, and a contributing editor for *Keep More Quarterly*, Ed Slott and Company's consumer retirement tax newsletter offering practical strategies to reduce taxes and avoid costly mistakes. His consulting work with members of the Elite IRA Advisor Group keeps him closely connected to the most pressing IRA concerns across the country, providing real-time insight into the pulse of the retirement planning industry.

In addition to his speaking engagements, Andy is a featured expert on The American College's Knowledge Hub+ platform, where he offers practical guidance to financial professionals. Throughout his career, Andy has partnered closely with advisors, business owners, and plan sponsors, bringing a well-rounded perspective to retirement and financial planning.

Andy earned the CERTIFIED FINANCIAL PLANNER™ designation in 2008 and the Accredited Investment Fiduciary® (AIF®) designation in 2014. He has served as both a Board Member and past President of the North Florida Chapter of the Society of Financial Service Professionals.

IAN BERGER, JD

IRA Analyst

Ian Berger, JD, is an integral part of the team of America's IRA Experts, with over 30 years of experience advising on a wide array of ERISA and tax issues related to retirement plans. He is frequently quoted in *The Wall Street Journal* and *USA Today* and contributes articles to *TheStreet.com*. Ian is also a contributing writer and editor for Ed Slott's IRA Advisor newsletter, where he provides technical analysis and practical insight on complex retirement tax rules. He is also a contributing editor for Keep More Quarterly, Ed Slott and Company's consumer retirement tax newsletter offering practical strategies to reduce taxes and avoid costly mistakes.

Ian is a knowledgeable technical resource and educator for Ed Slott's Elite IRA Advisor Group SM, a prestigious study group of top financial professionals, and regularly presents *at* Ed Slott's 2-Day IRA Workshop and Ed Slott and Company's *IRA Success*, powered by The American College of Financial Services. He also serves as a featured Expert on The American College's Knowledge Hub+ platform.

He appears in Ed Slott and Company's *The Ultimate Retirement Tax-Saving Roadmap*—a national education campaign helping retirement savers understand how proactive tax planning can protect and preserve their savings.

During both virtual and in-person training sessions, Ian is known for his ability to provide precise, actionable guidance on complex IRA questions. Attendees are consistently impressed by the dual delivery method, where one Expert presents while Ian and team field a high volume of technical questions, showcasing their in-depth knowledge and mastery of the subject matter.

In his earlier career, Ian served as General Counsel to the City of Baltimore Retirement Systems, managing all legal matters for the City's Employees' Retirement System and Deferred Compensation Plan. He has also practiced law with Gordon Feinblatt and worked as a consulting attorney with Mercer Consulting.

Ian earned his B.A. from the University of Pennsylvania and his law degree from the New York University School of Law. He is a member of the Maryland Bar Association.

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:

"This was the clearest and most comprehensive training I've had on the OBBBA/SECURE/SECURE 2.0 Acts that I've had. Thank you for helping me understand the practical implications for my clients!"
Ryan Ovenden, CFP®, CKA®

"The totality of the coverage on SECURE & SECURE 2.0 was far more in-depth and wider ranging than any workshops and presentations by various wholesalers and vendors. A definite must attend if you're into holistic financial planning."
Charles Newton, FA

"Knowing how tax law changes affect clients makes me much better in meetings - can anticipate questions and so have answers formulated in advance thanks to this seminar."
Sharon Egan, CFP®

"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

"The four seasoned presenters keep it engaging, breaking down the technical details, highlighting pitfalls, and bringing it to life with real examples and IRS rulings. They also offer great ideas on how to apply the information to help clients, drawing from their extensive experience."
— Dixie Roberts

"Drop what you are doing when Ed Slott conducts a seminar. Very thorough, great presentation skills and informative...you will take home 'nuggets' every single time that you will implement in your practice and be a hero." —Barry Dreayer

"As a financial professional I rely on Ed's timely & thorough updates to bring the most value to my clients. He is hands down the best presenter on IRAs, Roths, and retirement planning tips. His blog, newsletter, and webinars are invaluable, and his delivery is always lively & engaging! Thank you, Ed! Keep rocking!!" —Angela Ruff

"Great webinar! The information provided could save my clients many thousands of dollars in tax!"
—Dean Duncan

"UNBELIEVABLE! All that expertise in one person?! WOW! I learned so much!" —Sheila Baugh

"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

AMERICA'S IRA EXPERTS

"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

WHAT RETIREES ARE SAYING:

From Ed Slott and Company's national consumer campaign, The Ultimate Retirement Tax-Saving Roadmap

"I'm 62 and sweating bullets about the tax bomb, but Ed's roadmap gave me real steps to shield my savings. Watched it twice already!"— *YouTube Viewer*

"I almost got crushed ignoring Roth rules. After Ed's advice, I saved $8K in taxes last year."
— *YouTube Viewer*

"That fear of outliving my savings after taxes wipe half — it's real. Ed's roadmap feels like a lifeline."
— *YouTube Viewer*

"Inflation's gnawing, taxes lurking… feels like a trap door under retirement. But watching this video? Spark of hope." — *YouTube Viewer*