



IRA Summit™

Agenda

Day 1 - The IRA Opportunity

- 1:00 P.M. The Perfect Storm of IRA Opportunity**
- Money in Motion!
 - The Retirement Crisis in America
 - The History of Retirement Plans in America
 - The Longevity Crisis in America
 - The Pension Meltdown
 - Why Clients Spend More Time Choosing a Restaurant Than Planning Their Retirement
 - The Invisible Enemy – Heavy, Immediate and Unnecessary Taxation
 - Wall Street's Zero Sum Game
 - The New Retirement Mentality
 - How to Gain IRA Expertise and a Competitive Edge in Your Community
- 2:00 P.M. Is Your Client's IRA an IOU to the IRS?**
- How Proper Planning Today, Can Prevent Estate and Income Tax From Destroying Your Client's IRA
 - The Power of Multi-Generational IRA
 - How to Avoid Losing Up to 80% of Your IRA to Uncle Sam
 - The Three Biggest Tax Breaks in the Internal Revenue Code
 - The Power to Tax is the Power to Destroy
 - The Power of Tax-Deferred Accumulated Interest
 - The Miracles of a Multi-Generational IRA and How it Works
 - Sample Illustrations and Case Studies
- 4:30 P.M. Income for Life – Strategies for Creating a Guaranteed Stream of Income**
- What If I live? I'm Gonna Outlive My Money!
 - Withdrawal Strategies – Winning the Withdrawal Game!
 - Income for Life
 - When to Take IRA Withdrawals
- 6:00 P.M. Optional Group Dinner**



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