Hosted By

AMERICA'S TAX SOLUTIONS®

ACCOUNTANTS AND ADVISORS

VIRTUAL IRA SUMMIT™

FOR FINANCIAL ADVISORS AND ACCOUNTANTS

The **SECURE Act** single-handedly upended many long-standing retirement rules when it became effective 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.***

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.

Leading financial advisors and accountants, **those who take the reins** during one of the most uncertain and difficult periods in American history, need to be knowledgeable on these significant tax laws and updates.

Are You Prepared To Answer Your Clients' Questions And Be A Knowledgeable Expert In This New Terrain?

Join us **December 2-4, 2020** for America's Tax Solutions® **VIRTUAL IRA Summit** to receive the latest **IRA/401k** and tax rules and leave with a Monday morning action plan that turns **cutting-edge strategies** into improved client relationships and increased business.

Participants will learn how to help your clients and prospects:

- ★ Navigate **SECURE Act** and **CARES Act** extensions, key dates and deadlines
- ★ Consider **new planning opportunities** and **critical updates** with the **end of stretch IRAs**
- ★ Understand the **RMD waiver** and **Coronavirus Related Distributions** (CRDs)
- ★ And more

Become the trained specialist your clients and prospects want and need! Our educational IRA experience includes:

- ★ Digital course manual
- ★ A detailed analysis of the most recent tax law changes, case studies, private letter rulings, **Congressional action** and **Supreme Court rulings** to keep you on the cutting-edge of retirement, tax law and IRA distribution planning

Do you have what it takes to help clients tackle today's RETIREMENT CHALLENGES?

Please RSVP to reserve your seat.

Wednesday, December 2 to Friday, December 4, 2020

11:00 AM – 2:00 PM EASTERN | 8:00 – 11:00 AM PACIFIC

CLICK HERE TO REGISTER

goto.americastaxsolutions.com/irasummit

Why Should You Attend?

- ★ **Cutting-edge IRA distribution strategies** to help you outperform your competition
- ★ IRAs are the nation's **largest retirement accounts** with $8.2 billion and growing
- ★ **2.5 Million** baby boomers turned 70 ½ last year–are you ready to help them?
- ★ Coverage of the **SECURE & CARES Acts**
- ★ **Proactive messaging** that will showcase your expertise and generate lasting business
- ★ **Roth conversion planning tactics** to move more client money from forever-taxed to never-taxed
- ★ 25 IRA rules you **MUST** know and how you can **LEVERAGE** them into **NEW** business