

CPA PROGRAM

CPAs have an unprecedented opportunity to create and update tax and estate plans to help clients keep more of their hard earned money. Ed Slott and Company's IRA Analyst, Jeremy Rodriguez, JD, will provide you with the latest information and strategies to make you stand out from the competition and best serve your clients.

Advanced Tax Planning with Qualified Retirement Plans

This course will delve into the tax rules for Qualified Retirement Plans, including 401(k) and 403(b) plans, the impact of contributing after-tax dollars to those accounts, the different types of allowable post-tax contributions and the governing rules, and distribution strategies for plan accounts that include post-tax contributions. This course will focus on planning around the contribution, distribution, rollover and Roth conversion rules to help clients maximize their tax-favored retirement savings.

The course will also review Designated Roth Accounts – Roth 401(k)s and Roth 403(b)s – and other post-tax contributions.

In addition, the program will illustrate, with examples, how to use the retirement plan tax rules to increase after-tax plan contributions and convert those funds to Roth IRAs, including allocation strategies for profit sharing plans to maximize contributions for key personnel.



Jeremy Rodriguez, JD is an experienced ERISA attorney. He began his career with a benefit consulting firm and specialized in drafting plan documents, amendments and conducting compliance testing for a wide range of qualified plans. He also consulted with clients on retirement plan design, administration, and dispute resolution with third-party vendors.

He also served as in-house counsel role with a third-party administrator that managed pension and health plans for collectively bargained clients. In addition to managing the retirement plan documents and ensuring compliance with Federal law, Jeremy was responsible for implementing benefit changes to the health plans, and is experienced providing representation during IRS and Department of Labor audits on both pension and health plans.

Jeremy has given presentations on plan design, plan qualification, and retiree healthcare. Jeremy is a graduate of Ohio University and holds a juris doctor from the University of Toledo, College of Law. He is current member of the Ohio Bar and Toledo Bar Associations.

This 2-Hour Program Teaches You How To:

- Identify areas of planning impacted by the changes made by the Tax Cuts and Jobs Act and the Bipartisan Budget Act of 2018
- Gain an understanding of the contribution and distribution rules for Designated Roth Accounts, including Roth 401(k)s and Roth 403(b)s
- Learn the tax rules for converting after-tax plan funds to Roth IRAs
- Learn how to increase tax-free Roth IRA contributions with the Mega Back-Door Roth strategy
- Gain an understanding of how to maximize contributions to company retirement plans using the plan testing rules

Contact information: For more information regarding registration, refund, complaint and program cancellation, please contact Ed Slott and Company at (516) 536-8282.



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**JOIN ED SLOTT AND COMPANY ON
TUESDAY SEPTEMBER 18, 2018**