ED SLOTT AND COMPANY, LLC
America's IRA Experts

Earn 2 CPE Credits

CPA PROGRAM VI

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 Technical Consultant Jeffrey Levine, CPA will provide you with the latest information and strategies to make you stand out from the competition and best serve your clients.

Jeffrey Levine, CPA is an IRA Technical Consultant with Ed Slott and Company, LLC. He is an expert in IRA distribution planning and a consultant for both advisors and clients.

Jeffrey is a contributing writer and editor for Ed Slott's IRA Advisor newsletter, distributed to thousands of financial advisors nationwide, and writes for several areas of the company's websites, www.irahelp.com and www.theslottreport.com. He is a contributing author to the 2012 edition of *The Retirement Savings Time Bomb... And How To Defuse It* and is a regular contributor to various industry publications. Jeffrey is quoted in numerous publications throughout the country, including *The Wall Street Journal, The New York Times, San Francisco Chronicle, Kiplinger's Retirement Report, Smart Money* and *Yahoo Finance*, and is a contributor to the RetireMentors section of *MarketWatch*.

This 2-Hour Program Educates You On:

- Understanding and Planning with the 72(t) Rules
- Using HSAs as Retirement Planning Vehicles
- Using the Roth IRA as an Alternative to 529 Plans for College Funding
- Current Issues in Trust Planning for IRAs
- Spousal Beneficiary Planning
- What's New With Retirement Accounts

No Fee to attend

Program Level: Intermediate

Prerequisites: None

Advanced Preparation: None

Delivery Method: Group-Live

Contact information: For more information regarding refund, concerns and/or program cancellation policies, please contact Ed Slott and Company at 516-536-8282.

NATIONAL REGISTRY OF CPE SPONSORS

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.learningmarket.org.

JOIN ED SLOTT AND COMPANY FOR THIS SPECIALIZED 2-HOUR TRAINING PROGRAM!

BRUTON FINANCIAL ADVISORS
supporting individuals and businesses with financial solutions

September 30th, 2015
8:00 – 10:00 a.m. (Breakfast Served @ 7:45)
Downingtown Country Club
RSVP to Donna by 9/25—dzaprala@brutonfinancial.com