IRA SUMMIT™

Agenda October 25-27, 2023

Wednesday, August 25th

8:30 AM Meet the Team

9:00 AM Welcome and Maximizing This Meeting
Jeffrey Campbell, SVP and Chief Sales Officer

- Master the SECURE Acts
- Note taking and identifying clients who can benefit the most
- Powerful Information: Use it or Lose it!
- Experience matters
- Gain exclusive knowledge & access
- Get focused, get educated, take action!
- Questions?

9:45 AM Why Are You Here?
Sam O'Neil, Marketing Specialist

10:00 AM The Perfect Storm of IRA Opportunity
Barry Bulakites, President and CEO

- The retirement and longevity crisis in America
- The invisible enemy – heavy, immediate unnecessary taxation
- Help your clients take financial control, avoid unnecessary taxes and combat the latest threats to their retirement savings
- Playing the Back Nine
- Help your clients have more, keep more, and make it last a LIFETIME!

11:00 AM Making Income Last A LIFETIME
Jeffrey Campbell, SVP and Chief Sales Officer

- Making income last a lifetime
- The elevator chart – now, later, never

11:30 AM Communicating Information Effectively
Rafa Mendez, Marketing Director

- Leveraging knowledge
- Marketing "THE RIGHT WAY"
- OUTFLOW = INFLOW
- The tools and techniques of effective communication

12:00 PM Lunch on Your Own

1:30 PM Rethinking Retirement Tax Planning for 2023 and Beyond – *Barry Bulakites, President and CEO*

- The two tax systems
- Legislative risk
- The retirement roadmap

2:00 PM Navigating the SECURE Acts
Barry Bulakites, President and CEO, Table Bay Financial

- Planning for the end of the stretch IRA
- The 3 new beneficiary categories
- Eligible designated beneficiaries – who qualifies?
- SECURE Act planning solutions
- Why most beneficiaries will continue to overpay their taxes
- Common mistakes made in setting up inherited IRAs
- IRA beneficiary selection
- IRA beneficiary form mistakes, that wiped out inheritances

3:30 PM SECURE Act Impact on STRETCH IRAs

- Is "The Stretch" really dead?
- How post-death payouts will work
- The "Least as Rapidly Rule"

AMERICA'S TAX SOLUTIONS®
ACCOUNTANTS AND ADVISORS

Thursday, August 26th

8:30 AM Review

9:00 AM SECURE Act Impacts
Barry Bulakites, President and CEO

- Practical examples – post death payouts based on type of beneficiary
- The abyss and confusion of the SECURE Acts
- Anomalies and exceptions
- How advisors can monetize these issues to build new business

10:00 AM IRA Custodians – The Good, The Bad, The Ugly

- What to look for in an IRA custodian
- The IRA custodial checklist
- Why most Americans will choose the wrong custodian

10:30 AM IRA Rules You Must Know

- IRA UPDATE: the latest IRA tax law changes, including the SECURE Act, new tax strategies, rulings, court cases and planning opportunities
- The rules you must know!
- Making sure your E&O is up to date

11:30 AM The Trust Effect

- IRA TRUST EFFECT – Most will not work anymore
- Naming trust as IRA beneficiary- why it's such a bad idea!

12:00 PM Lunch Break

1:30 PM To Roth or Not To Roth – That is The Question

- Roth IRA conversion planning
- The pros and cons of Roth conversion
- Roth conversion timing ideas
- The Roth conversion evaluation – more critical now than ever

2:30 PM Key Marketing Strategies for Leveraging the SECURE Acts

- How to capitalize on the SECURE Act planning for big results now
- Maximum, not minimum RMDs – pre-RMD planning tactics
- SECURE Act review and checklist
- NEW opportunities to mitigate tax risk and provide valuable retirement solutions for your clients, prospects, and referral sources
- Identifying which clients will benefit the most

3:00 PM Product Boot Camp
Jeff Campbell

- Best In Class
- Why would anyone choose to lose money, in an environment where products with no loss in triple-digit participation rates exist?
- The myth and reality of fixed indexed annuities
- FIUL vs. WL

5:00 PM Wrap Up

Friday, August 27th

8:45 AM The Answer to the Dilemma of Roth
Barry Bulakites and Jeff Campbell

- IRC Section 7702 Plans
- Why IRAs are the WORST asset
- How to plan for larger inheritances and more control with less tax

10:30 AM IRAs and Charitable Planning

- How to use the SECURE Act to attract large IRA rollover clients
- Advising clients on key rollover decisions
- How to plan for estate tax uncertainty

11:00 AM Advisor Action Plan

- How's your marketing plan going?
- What have you done to eliminate the volatile sales cycle?

11:30 AM What's Next?

- There are 3 types of people

12:00 PM Wrap Up

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