ED SLOTT AND COMPANY'S

IRA Success

POWERED BY THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

"It's a game-changer that brings IRA knowledge to any financial professional. Anytime. Anywhere. There's no comparison in the industry."

ED SLOTT, CPA, PROFESSOR OF PRACTICE
AMERICA'S IRA EXPERT

THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

TheAmericanCollege.edu/IRASuccess

An Industry-First Program Powered by Two Financial Education Leaders

Individual retirement accounts (IRAs) are subject to a complex web of tax laws, with a single misstep potentially crippling retirement dreams and generational legacies. But when used properly and planned proactively, IRAs are powerful retirement and estate planning vehicles.

Most financial advisors are focused on asset accumulation, often lacking knowledge to help their clients with tax planning in the distribution phase. At the end of the day, it's what the client keeps that counts—after taxes.

Ed Slott and Company's IRA Success, powered by The American College of Financial Services, is an innovative, on-demand, 12-course program that combines the expertise and clear-cut language of **Professor of Practice Ed Slott, CPA**, and his team of IRA experts with The College's pedigree in e-learning design and delivery.

More than 42 million households own an IRA—a ticking time bomb of taxes in need of your expertise!

Applied Knowledge to Improve Client and Business Outcomes

Ed Slott and Company's IRA Success is rooted in applied knowledge—with a curriculum built by Ed Slott, America's IRA Expert, College Professor of Practice, and a practitioner with decades of client-facing experience.

Crafted to maximize learning that's applicable immediately, IRA Success checks every box:

- 12 courses on IRA tax laws and rules, complete with ready-to-go action plans
- Engaging video presentations with Ed Slott and his team of IRA experts
- Robust resources with each course, including charts and 100 frequently asked questions
- Course manuals called a "goldmine" of actionable insight by industry peers
- A mobile-first platform for anytime, anywhere learning
- Assessments to test your knowledge
- Valuable continuing education credits

> *"It would be tough to find anyone who knows more about IRAs than CPA Slott.*
>
> —USA TODAY

Program Details

Tuition: $205 per course; $2195 for full 12-course program (Save $265)

Timing: 1 hour per course (complete the program in 12 hours)

Format: 100% online, self-study

Learning Outcomes:

- Recognize and avoid costly errors made by other advisors, CPAs, and estate planning attorneys
- Apply IRA planning insights that will help your clients protect and grow their retirement savings
- Implement IRA knowledge through a demonstrated action plan to build your business

Continuing Education Credit

IRA Success offers a variety of CE credits per course or for the entire program.
Learn more at TheAmericanCollege.edu/IRASuccess.

DESIGNATION CREDIT

The American College: 1 Credit Per Course (12 Credits Per Program) Credit hours can go toward Professional Recertification continuing education requirements for CAP®, CASL®, ChFC®, ChSNC®, CLF®, CLU®, FSCP®, RICP®, and WMCP® designee holders. For more information on The College's Professional Recertification Program, visit TheAmericanCollege.edu/Recertification.

CFP®: 27.5 Credits for Full Program Enrollees
CFP® credits for individual courses vary. Visit TheAmericanCollege.edu/IRASuccess to learn more.

INSURANCE CREDIT BY STATE

Visit TheAmericanCollege.edu/IRASuccess to learn more.

Courses

CE151: Navigating the CARES and SECURE Acts
CE152: Planning for the End of the Stretch IRA
CE153: IRA Beneficiary Examples, Mistakes, and Checklists
CE154: 25 IRA Rules You Must Know (Part One)
CE155: 25 IRA Rules You Must Know (Part Two)
CE156: 25 IRA Rules You Must Know (Part Three)
CE157: Roth IRAs: Conversions, 3 Questions to Ask, Estate Planning
CE158: Roth 401(k) Rules / IRA Update and Tax Planning Strategies
CE159: Naming Trusts as IRA Beneficiaries (Part One)
CE160: Naming Trusts as IRA Beneficiaries (Part Two)
CE161: Advising Clients on Key Rollover Decisions
CE162: Estate and Life Insurance Planning with IRAs

Full 12-Course Program
CE163: Ed Slott and Company's IRA Success

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(Ed SLott is) The Best Source for IRA Advice

—THE WALL STREET JOURNAL

With a unique and unwavering commitment to applied financial knowledge that delivers instant impact and lasting real-world outcomes, The American College of Financial Services offers one of the most valuable, and most valued, educations you can receive. The College is distinguished by resources of the highest quality, innovation in program delivery and design, and results that create sustainable career advantages. As a nonprofit, accredited higher education institution, our courses are researched and developed by a faculty of the nation's top financial thought leaders. Our goal is to ensure that you are viewed by clients and peers as the best and brightest in your field.

Visit TheAmericanCollege.edu/IRASuccess
or call 888-263-7265

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