

James Lange, CPA/Best-Selling Author, Host Free Asset Protection Webinars for Retirement Plan/IRA Owners, April 18, 2024

Secure a spot in this essential webinar designed to empower IRA/Retirement plan owners with knowledge and strategies to navigate SECURE Act 2.0.

LOS ANGELES, UNITED STATES, April 1, 2024 /EINPresswire.com/ -- James "Jim" Lange, a renowned best-selling author, CPA, and attorney with extensive experience in retirement and estate planning, will host a free financial education webinar. This webinar is a unique opportunity for married owners of large retirement and IRA plans to learn fundamental techniques for saving and preserving money for their loved ones. The event, scheduled for April 18, 2024, will be a comprehensive three-part series, delving into the intricacies of the SECURE Act 2.0 and providing insights on how to avoid common costly mistakes made by estate planners.

"Successful retirement planning is critical, but if you don't get your estate planning right, your family could lose hundreds of thousands in taxes. That can be prevented," informs Lange. "The SECURE Act is no friend to many IRA and retirement plan owners with \$1 million or more in retirement plans. Unless you take aggressive action, your loved ones will likely take a massive income tax hit upon inheriting any money from those plans."

Each three-part series focuses on a critical aspect of estate planning and the steps needed to ensure beneficiaries are protected from significant taxes on their inherited tax-advantaged retirement/IRA plans.

SESSION #1: 10 am – Noon Eastern

- Wealth Preserving Roth Conversion Strategies That You May Have Missed



James Lange

In this workshop, attendees will learn about essential tax-deferral strategies like Roth plans and new exceptions introduced by the SECURE Act affecting retirement planning. The session will cover methods to safeguard against tax acceleration for heirs and capitalize on SECURE Act 2.0 for advantageous Roth conversions.

*In addition to basic and unknown advanced Roth conversion techniques, advanced concepts for Roth IRA conversions will be discussed, including:

- Discover how to transfer after-tax dollars from retirement plans to a Roth IRA with zero expenses, potentially preserving hundreds of thousands of dollars in future tax savings.

- Uncover the strategy of converting an inherited retirement plan to a Roth at the beneficiary's tax rate, offering substantial tax savings for eligible individuals, leveraging their tax bracket instead of your own.

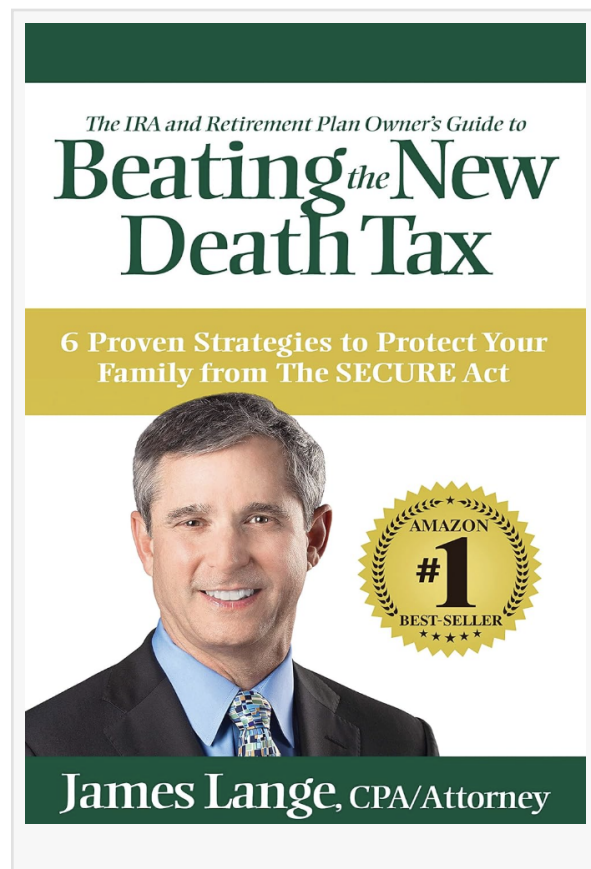
SESSION #2: 12:30 – 2:30 PM Eastern

- Outsmarting the SECURE Act: The Best and Most Flexible Estate Plan for Married IRA Owners, Combined with Optimal Trust Planning for IRAs and Retirement Plans

Even with a well-executed retirement plan, if estate planning is implemented improperly, hundreds of thousands of dollars could be lost to taxes. However, Lange says this can be avoided. His disclaimer-based estate planning system will provide strategies to prevent massive taxation.

"Getting trusts right, mainly when the underlying asset is an IRA or retirement plan, is crucial. In our reviews of trusts of this type, more than half the trusts we examine are not done right. This common estate planning mistake can be devastating for families with a significant IRA and who prefer leaving money to one or more beneficiaries in a trust rather than leaving it to them outright. This could be a minor's trust, a spendthrift trust, or an asset protection trust. This workshop highlights these common sloppy and costly estate planning errors and how to avoid them," explains Lange.

SESSION #3: 3 – 5 PM Eastern



- A Live Q&A with Jim Lange, CPA/Attorney: Your Questions Answered on Roth IRAs, Minimizing Taxes, and Estate Planning

Attendees will be able to have their financial questions answered by Jim Lange. Questions can be submitted before the webinar, and Jim will also address live questions from the audience.

*Upon attending any session, attendees will receive 6 Valuable Bonus Gifts, provided at no cost!

Bonus 1: Upon registration, attendees will receive a complimentary hardcover copy of Jim's renowned book, "Retire Secure for Professors and TIAA Participants."

Bonus 2: Included is a digital copy of Jim's bestseller, "Retirement Plan Owner's Guide to Beating the New Death Tax," offering insights on navigating the SECURE Act.

Bonus 3: Attendees will also gain access to Jim's acclaimed book, "The Roth Revolution: Pay Taxes Once and Never Again," in digital format, illustrating the benefits of Roth IRA conversions.

Bonus 4: Additionally, attendees will receive a digital copy of Jim's guide on Social Security, "The \$214,000 Mistake: How to Double Your Social Security & Maximize Your IRAs."

Bonus 5: Attendees can enjoy a digital copy of Jim's latest release, "Retire Secure for Parents of a Child with a Disability."

Bonus 6: Qualified attendees are eligible for a FREE Retire Secure Initial Consultation with Jim Lange and one of his expert CPAs.

James "Jim" Lange, CPA, heads two linked firms in Squirrel Hill, offering comprehensive financial services to IRA and retirement plan holders. With over three decades of experience, he specializes in tax planning and preparation through his CPA firm. He provides innovative Roth IRA conversion strategies and conservative money management through a registered investment advisory firm. As President and Founder of The Roth IRA Institute™, Jim is a sought-after speaker for top insurance companies, money managers, and industry associations nationwide.

To learn more about James Lange, [click here](#).

For more information about the free educational webinars for married IRA and retirement plan owners, click here: <https://paytaxeslater.com/2024Workshops/>

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