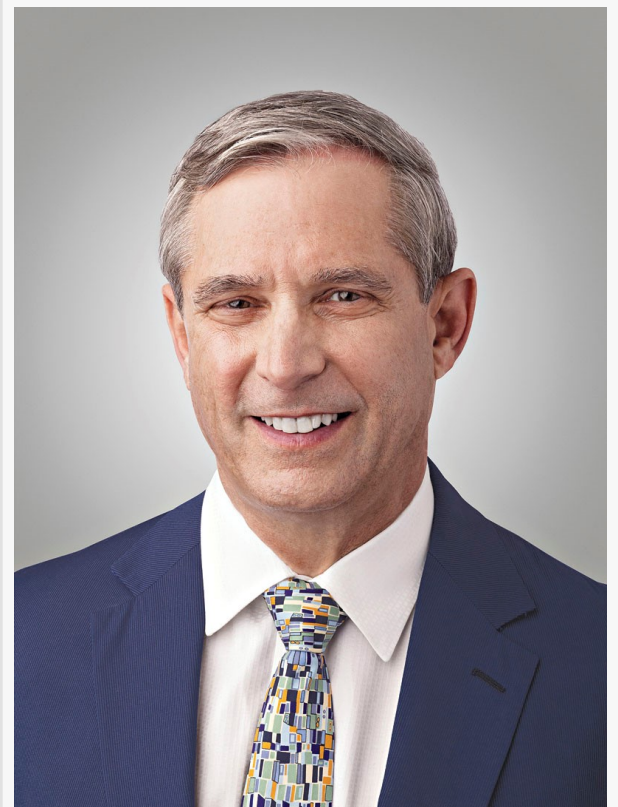


Jim Lange, Best-Selling Author/CPA to Host FREE Educational Workshops on June 22, 2024

PA, UNITED STATES, June 3, 2024 /EINPresswire.com/ -- James "Jim" Lange, best-selling author, CPA, and attorney, offers three [FREE Educational Workshops](#) for IRA and Retirement Plan Owners with Large Retirement Plans and/or IRAs on Saturday, June 22, 2024, at the Crowne Plaza, 164 Fort Couch Road, Pittsburgh, PA 15241. These workshops are designed for individuals with large retirement plans and/or IRAs seeking expert guidance on wealth preservation, estate planning, and securing the financial future of their loved ones. All sessions are free to attend, and complimentary refreshments will be provided.

"As a consequence of the SECURE Act, we introduce new exceptions to consider during your life's accumulation, distribution, and estate planning stages. The SECURE Act restricts the time beneficiaries can hold onto inherited tax-advantaged retirement/IRA plans. That means massive income tax acceleration for your children unless you and your heirs take protective action. We will also cover how to take advantage of the even more recent legislation SECURE Act 2.0 and introduce new cutting-edge Roth conversion strategies," Lange explains.



James "Jim" Lange

SESSION ONE:

~ Wealth Preserving Roth Conversion Strategies that You May Have Missed
(10 am-Noon)

*Discover a wealth of knowledge in essential fundamentals and advanced techniques for Roth IRA conversions. Explore innovative strategies tailored to capitalize on recent legislative changes, including the SECURE Act and SECURE Act 2.0.

*Uncover the intricacies of transitioning taxable investments into tax-free environments, enabling leverage of favorable tax rates to optimize an individual's financial portfolio.

SESSION TWO:

~ Outsmarting the SECURE Act: The Best and Most Flexible Estate Plan for Married IRA Owners Combined with Optimal Trust Planning
(12:30 – 2:30 PM)

* Workshop attendees will gain invaluable insights into navigating the complexities of estate planning under the SECURE Act. They will explore effective trust planning strategies to protect heirs from unnecessary taxation and preserve assets.

* Additionally, participants will understand the critical importance of crafting a flexible estate plan that is meticulously tailored to their unique circumstances and financial objectives.

"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," says Lange.

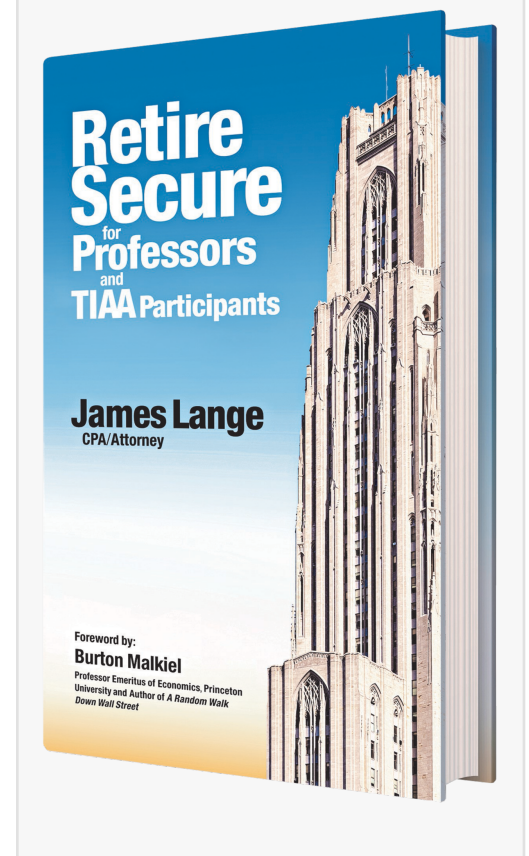
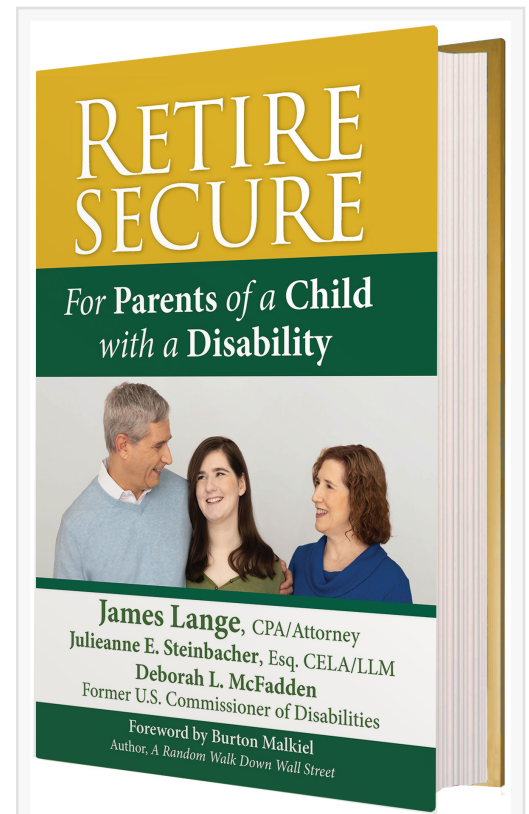
SESSION THREE:

Long-Term Financial Protection Strategies for Parents of a Child with a Disability
(Time: 3 – 5 PM)

* Hear personal experiences and effective strategies from Jim Lange on securing the financial future of special needs children.

* Explore overlooked opportunities for optimizing Roth IRA conversions and ensuring financial security for your child's lifetime.

Attendees will also receive valuable bonus gifts, including hardcover copies of Jim Lange's bestselling books and a free initial consultation with Jim Lange and his team of experts.



~ Some of Jim's books have become classics endorsed by the country's top experts. Retire Secure! was endorsed by Charles Schwab, Larry King, Jane Bryant Quinn, and 50 other experts.

To reserve seats for these informative workshops, call 412-521-2732 or register online at <https://paytaxeslater.com/JuneWorkshops/>

James "Jim" Lange is a renowned CPA/Attorney whose tax and estate planning strategies have been endorsed by The Wall Street Journal. With over 10 bestselling books and numerous peer-reviewed articles, Jim Lange is a trusted retirement planning and financial security authority. As the President of two companies specializing in financial services for IRA and retirement plan owners, Jim brings unparalleled expertise to the field. He is the founding President of a distinguished CPA firm specializing in comprehensive tax planning and preparation. Additionally, he oversees a registered investment advisory firm renowned for its innovative Roth IRA conversion strategies and prudent money management solutions.

To learn more about Jim Lange and his work, click here: <https://paytaxeslater.com/>

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