

Expert Bios



Ed Slott, CPA is a nationally recognized IRA distribution expert, professional speaker, television personality, and best-selling author. He is known for his unparalleled ability to turn advanced tax strategies into understandable, actionable and entertaining advice. He has been named “The Best Source for IRA Advice” by The Wall Street Journal, and USA Today wrote, “It would be tough to find anyone who knows more about IRAs than CPA Slott.”

As president and founder of Ed Slott and Company, LLC, the nation’s leading source of accurate, timely IRA expertise and analysis to financial advisors, institutions, consumers and media, he provides:

1. Advanced training to financial professionals to become knowledgeable recognized leaders in the retirement marketplace; and
2. Answers to retirement savers’ most important questions, continually providing practical, easy-to-understand information on IRA, retirement, tax and financial planning topics.

Mr. Slott is a Professor of Practice at The American College of Financial Services and regularly presents on IRA and estate planning strategies at both consumer events and conferences for financial advisors, insurance professionals, CPAs and attorneys, including virtual events drawing thousands of attendees nationwide. He has provided topical keynote presentations for leading financial membership organizations, including the Financial Planning Association, National Association of Personal Financial Advisors, Estate Planning Councils and the American Institute of Certified Public Accountants, as well as leading corporate financial firms coast-to-coast. He is also the creator of Ed Slott’s Elite IRA Advisor Groupsm, an organization of more than 475 of the nation’s top financial professionals who attend his ongoing continuing-education programs to maintain a mastery of advanced retirement account and tax planning laws.

Mr. Slott is an accomplished author of many financial and retirement-focused books, including most recently Ed Slott’s Retirement Decisions Guide: 2022 Edition (IRAHelp, 2022) and Fund Your Future: A Tax-Smart Savings Plan in Your 20s and 30s (IRAHelp, 2021) with The New Retirement Savings Time Bomb: (Penguin Random House, 2021). He also hosts the popular website irahelp.com as a resource for financial professionals and consumers, where The Slott Report blog is followed by tens of thousands of readers. As the go-to resource for media on timely insight on breaking news as it relates to retirement and tax planning laws and strategies, Mr. Slott is often quoted in *The New York Times*, *The Wall Street Journal*, *Forbes*, *USA Today*, *Kiplinger*, *Investor’s Business Daily* and numerous additional national magazines and financial publications. He provides a monthly Q&A column to AARP and is also a contributing columnist and media resource to Financial Planning, Financial Advisor and InvestmentNews magazines. He has appeared on many national television and radio programs, including *NBC*, *ABC*, *CBS*, *CNBC*, *CNN*, *FOX*, *FOXBUSINESS*, *NPR*, Bloomberg and Morningstar. He is one of the top pledge drivers of all time with his educational specials, including his most recent, “*Ed Slott’s Retirement Freedom*” (2022).

In 2021, Ed Slott and Company was named to ThinkAdvisor LUMINARIES for its thought leadership, education and impact on driving the retirement industry forward. Mr. Slott is a past Chairman of the New York State Society of CPAs Estate Planning Committee and editor of the IRA planning section of the CPA Journal. He was named a 2020 InvestmentNews Innovator for his significant contribution to helping advisors improve client outcomes and tackle industry challenges as well as the 2020 Sidney Kess Award Winner for excellence in continuing education by the AICPA®. He is also the recipient of the prestigious “Excellence in Estate Planning” and “Outstanding Service” awards presented by The Foundation for Accounting Education. He is a former board member of The Estate Planning Council of New York City and is Accredited Estate Planner (AEP) distinguished.

Ultimately, through all of these efforts combined, Mr. Slott has taught millions of Americans (and their financial professionals) how to get the most out of their retirement savings.



Sarah A. Brenner, JD has worked for over twenty years helping clients solve complex technical IRA questions. She has been a contributing writer for many IRA texts, articles and training manuals and has been quoted in national financial and tax publications such as *USA Today*, *The Wall Street Journal*, *The Philadelphia Inquirer*, and *CCH IRA Guide*.

She is an experienced speaker who has educated thousands of professionals in the financial industry including attorneys, CPAs, bankers, financial advisors, and brokers on retirement plan rules. Brenner has won praise for her ability to communicate complex laws in an easy-to-understand way and provide practical strategies for clients.

She 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 website, irahelp.com. Brenner also serves as a valuable resource for the members of Ed Slott's Elite IRA Advisor GroupSM, a 400+ member organization of some of the country's top financial advisors who are dedicated to becoming experts in IRA distribution planning.

She is a graduate of Smith College and Villanova School of Law. She is a member of the Pennsylvania Bar. She practiced law with a concentration in elder law for several years and for fifteen years was a senior consultant with PMC, Pension Management Company, an independent IRA consulting firm for financial organizations nationwide.



Andrew Ives, CFP®, AIF® has over 20 years of experience in the financial services industry where he has engaged in a wide range of duties. Ives was a relationship manager at a mutual fund company and sold short duration investment products to institutional clients. He wholesaled 401(k) record keeping solutions to financial advisors and direct to business owners.

Most recently, he worked as a Regional Sales Director for a third-party administrator where he partnered closely with advisors and plan sponsors. Ives earned the Certified Financial PlannerTM designation in 2008, the Accredited Investment Fiduciary designation in 2014, and served as Board member and past President of the North Florida Chapter of the Society of Financial Service Professionals.



Ian Berger, JD has over 30 years of experience providing advice on a wide array of ERISA and tax issues relating to retirement plans. He has worked closely with 401(k), 403(b), 457(b) and defined benefit plans, as well as IRAs.

Most recently, Berger served as General Counsel to the City of Baltimore Retirement Systems, where he handled all legal matters pertaining to the City's Employees' Retirement System (a defined benefit plan) and Deferred Compensation Plan (a 457(b) plan).

He previously practiced law at the Baltimore law firm of Gordon Feinblatt and worked as a consulting attorney with Mercer Consulting.

Berger received his B.A. from the University of Pennsylvania and his law degree from the New York University School of Law. He is a member of the Maryland Bar.

