ED SLOTT AND COMPANY'S **IRA Success**

POWERED BY THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

Continuing Education Course Syllabus

Course Number: CE158
Course Name: Roth 401(k) Rules / IRA Update and Tax Planning Strategies
Prerequisites: None

Course Description

This course provides an overview of Roth 401(k) planning and includes a review of the latest tax rule changes and planning opportunities. Students gain insight on the "mega back-door Roth" and evaluate contributions and distribution rules for a popular list of Roth company plans. In addition, this course includes charitable IRA planning strategies using qualified charitable distributions (QCDs).

Learning Objectives

Upon successful completion of this course, you will confidently be able to:

- Execute Roth IRA conversions from company plans,
- Navigate Roth 401(k), Roth 403(b), and Roth 457(b) contribution and distribution rules, and
- Implement the latest IRA tax law changes into clients' retirement distribution planning.

About the Experts

Ed Slott and Company is the nation's leading source of accurate, timely IRA expertise and analysis to financial advisors, institutions, consumers and media across the country. Combined, Ed Slott's team of IRA experts possess over 70 years of experience in retirement education and in the facilitation of strategies to navigate the complexities of IRAs to financial advisors, CPAs, attorneys, insurance agents, and more.

Their mission is to educate financial professionals on an individual and corporate level to become knowledgeable, recognized leaders in the retirement marketplace; and to provide solutions to the most critical dilemmas and continually deliver practical, applicable, and easy-to-understand information on IRA, retirement, tax, and financial planning topics.

**Individual bios for each of the experts are located inside the classroom.*

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Course Outline

Review	Download	Complete
Course Presentation	Roth 401(k) Five Year Holding Period Charts Comparison Chart Roth 401(k), 403(b), and Governmental 457 Plans: Advisor Action Plan SECURE 2.0 Key Effective Dates Course Manual Syllabus Expert Bios	Final Course Assessment

Evaluation Procedures

The final course assessment consists of a multiple-choice quiz that will assess a learner's knowledge of the topics explored in the course. Learners must earn a score of 70% or better to complete the course successfully and earn continuing education credit. For questions about continuing education credits, please email: CE@theamericancollege.edu.

Course Policies

This self-paced continuing education course is delivered on The American College of Financial Service's Knowledge Offerings learning management system. Learners may work at their own pace, but are expected to review all course content, complete all course activities, and abide by all policies and procedures of The American College of Financial Services, located at https://www.theamericancollege.edu/resources/student-resources-policies.

Technical Support

If you encounter any technical difficulties within the platform, please access the support link and issue a support ticket to our helpdesk. For other questions, contact the Institute for Learning Innovation by email: Innovation@theamericancollege.edu.

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