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

POWERED BY THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

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 keynote presentations 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.

Among the most popular of his resources are his advanced training programs for financial professionals. He is the creator of Ed Slott's Elite IRA Advisor Group℠, an organization of more than 500 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. Additionally, his *Instant IRA Success* program is a live 2-day IRA workshop covering up-to-the-minute information with immediately actionable intel, and *IRA Success* is an on-demand, CE-eligible, 12-course program powered by The American College of Financial Services.

Mr. Slott is an accomplished author of many financial books, with his latest, *The Retirement Savings Time Bomb Ticks Louder: How to Avoid Unnecessary Tax Landmines, Defuse the Latest Threats to Your Retirement Savings & Ignite Your Financial Freedom* (Penguin Random House, 2024) scheduled for release in 2024. His popular website, irahelp.com, is a resource for financial professionals and retirement savers, 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 regularly provides a Q&A column to AARP and is also a contributing columnist and media resource to *Financial Advisor and InvestmentNews* magazines. He has appeared on many national television and radio programs, including *NBC, ABC, CBS, CNBC, CNN, FOX, Fox Business, NPR, Bloomberg and Morningstar*. He is one of the top pledge drivers of all time with his public television educational specials.

Mr. Slott has been recognized for his significant contributions to the financial industry as an *InvestmentNews* Innovator, Sidney Kess Award Winner for excellence in continuing education by the AICPA®, *ThinkAdvisor* Luminary Award winner, and 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. He is also 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*.

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 almost 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 *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. Sarah has won praise for her ability to communicate complex laws in an easy-to-understand way and provide practical strategies for clients

Sarah 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, www.irahelp.com. Sarah also serves as a valuable resource for the members of Ed Slott's Elite IRA Advisor Group℠, a 500+ member organization of some of the country's top financial advisors who are dedicated to becoming experts in IRA distribution planning. She consults with firm clients and creates IRA course manuals and training programs for financial advisors.

Sarah 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®, IRA Analyst at Ed Slott and Company, has over 20 years of experience in the financial services industry where he has engaged in a wide range of duties. Andy was a relationship manager at a mutual fund company and sold short duration investment products to institutional clients. Ives wholesaled 401(k) record keeping solutions to financial advisors and direct to business owners. Most recently before starting with Ed Slott and Company, Andy worked as a Regional Sales Director for a third party administrator where he partnered closely with advisors and plan sponsors. Ives 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. He also serves as a valuable resource for the members of Ed Slott's Elite IRA Advisor Group℠, a 500+ member organization of some of the country's top financial advisors who are dedicated to becoming experts in IRA distribution planning.

Ian Berger, JD, IRA Analyst at Ed Slott and Company, 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. Before joining Ed Slott and Company, 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.

Ian 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.

Berger also serves as a valuable resource for the members of Ed Slott's Elite IRA Advisor Group℠, a 500+ member organization of some of the country's top financial advisors who are dedicated to becoming experts in IRA distribution planning.

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