ED SLOTT AND COMPANY'S IRA Success

Continuing Education Course Syllabus

Course Number: CE157
Course Name: Roth IRAs: Conversions, 3 Questions to Ask, Estate Planning
Prerequisites: None

Course Description

This course highlights strategies to leverage life insurance in helping clients optimize the tax-free benefits of converted Roth IRAs to build larger retirement accounts. Students will examine real-world cases encountered by insurance professionals, providing practical insights and applications to enhance their financial planning expertise.

Learning Objectives

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

- Address the three questions to ask a client or prospect in every Roth conversion evaluation,
- Identify who should and shouldn't convert to a Roth IRA – because it's not everyone, and
- Develop an estate plan with Roth IRAs.

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.*

Course Outline

Review	Download	Complete
Course Presentation	Roth IRA: 5-Year Clocks & Distribution Ordering Rules 2025 Tax Planning Chart (Orange Chart) Syllabus Course Manual 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/about-the-college/the-college-at-a-glance.

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.