CPA
ACADEMY

AGENDA

DAY-1

America's Tax Solutions™ Overview

- The History of the Program
- Investing in Your Education
  - Overview of CPA Centric Training
    - Schedule
    - IRA Summit Overview
- America's Tax Solutions™ Concept and Value Proposition
- How to make the most of this program
- The Perfect Storm of IRA Opportunity
- The Three Biggest Breaks in the IRC and How to Leverage Them
- Building a Wealth Management Practice
- How to Increase Your Value to Your Clients

Why Your Clients Want You at This Meeting

- Testing Your Retirement IQ
- Keeping the money in the family away from the Tax Man
- Five Ways to Differentiate Your Practice
- The Difference between thinking you're right and knowing you are

Making You the "Go To" Expert

- Keep building Your IRA Knowledge
- Attracting New Clients
- America's Tax Solutions™

America's Tax Solutions™ Value Proposition

The Retirement Challenge

- The Perfect IRA - Is Your IRA Insured?
- The Long Happy Life of Your Retirement Account and What Can Go Wrong
  - The Three Phases of Retirement™
  - The Top Ten Ways Your Client Can Lose Their Retirement Account
- The Wealth Protection Plan
  - Building the framework for success
- The 4 Critical Risk to Retirement
- The 5th Hidden Risk to Retirement
  - The Wolf at the Door

The Power of Multi-generational IRAs

- American's face two challenges to a successful retirement
- What is a Multi-generational IRA vs. a Stretch IRA
- Sample Illustrations/Illustration Request Forms
- Good vs. Evil
- Avoiding the 80% tax on IRAs
- Why most beneficiaries overpay their taxes
- Establishing beneficiaries correctly
- Beneficiary Issues/types of Beneficiaries
- Death Distribution Issues
- Death Distribution Case Studies
- IRA Beneficiary Form Mistakes that wipe out inheritances
- IRA Beneficiary selection
- America's Tax SolutionsTM Beneficiary Form Checklist
- How to use the IRA Beneficiary Checklist to build referral's

DAY-2

Retirement Tax Horrors

- Common Mistakes in Setting Up Multi-Generational IRAs
- Critical Items
- Huge Retirement Mistakes that Clients and Their Advisors Make
- Failure to have do Asset Protection Planning - The Barth Calderon Connection

Custodians – The Good, The Bad, and The Ugly

- Understanding who they are and why they are so powerful
- What to look for in custodial documents
- What your clients need to know about their custodian and why they are oblivious to the importance of the custodian
- America's Tax SolutionsTM 10-Point Checklist
- Custodial Document Review Services

The America's IRA Experts™ Checklist Discovery System

- Your Clients Discovery Journey - The Retirement Roadmap™
- How to Implement the System
- The Account Inventory Form
- The Retirement Evaluation Checklist Implementation
- Retirement Planning Questions for Tax Season
- Retirement Analyzer Software™
  - Sample Output

Investing Today

- Rule #1
- Rule #2
- Look Familiar Chart
- ATS Annual Reset Strategy
- The Green Line
- Why Sequence of Returns Matter so Much

Naming Trust as IRA Beneficiaries

- When You Should and When You Shouldn't
- Avoid IRA Trust Mistakes that many clients make
- The Latest Trust Rulings
- The America's Tax SolutionsTM Trust Checklist

The Tax Free Zone

- Going From Forever Taxed to Never Taxed
- Roth IRAs
- Tax Diversification
- Section 7702 Plans
- Life Insurance Planning with IRAs
- Liquidity Analysis

Roth IRAs

- To Roth or Not to Roth – That's The Question
- 3 Questions to ask in every Roth Conversion evaluation
- Inherited Roth's from company plans
- Roth Alternatives

Tax Diversification

- The Concept of Tax Diversification
- The Ultimate Tax-Free Retirement Machine

Life Insurance Planning with IRAs

- Section 101
- Use it or Lose It!
- Leveraging Strategies
- Life Insurance as an income tool

Generating Guaranteed Stream of Income for Retirement

- The 4% Rule
- The Income Rider Revolution
- Section 7702 Plans
- The Concept
- Creating Income that the client can't outlive
- Dealing with the client that needs long-term care

DAY-3

Pathway to Success

- Practice Management / Revenue Enhancements
- The Opportunity Wheel
- Building Wealth Preservation Services Into Your Current Practice
- The Two Obligations
- The ATS/CPA Quick Start Guide
- Working with the local guy - The Competition Elimination System™
  - Advisor Check Up
  - The Up Front Contact
- 7 Ways To Differentiate Yourself from Every Other CPA
- Practice Management Legal Issues
- 90 - Day Focus Plans and Strategies
  - CD Alternatives
  - MGIRA
  - Tax Free Plans
  - The Wolf
  - Guaranteed Income for Life
  - In-Service Withdrawals
  - Policy Audits
- Living in a Glass House
- Putting Your Plan Together
- We Believe That Everyone Deserves a Better Financial Future
  - Your Client's Financial Future
  - The Financial Future of Their Heirs
  - You and Your Family's Financial Future
- Yes, You Can Afford to Be Great!
- How to Expand Your Business, Build Your Practice, and Secure Your Future
- How to Turn Your Tax Practice Into a Money-Making POWERHOUSE
- Working with your Wealth Preservation Consultant

Practice Management/Revenue Enhancements/ Succession Planning

- How to Increase Your Revenue by 300% in the Next 12 Months
- How to Gain IRA Expertise and a Competitive Edge in your community
- Using your competitive edge to increase the value of your practice by 4X in the next 19 months
- Setting Up a Succession Plan
- Marketing Your Practice
- How to obtain a Guaranteed Sale Price for Your Firm at Retirement, Death, or Disability
- Five Ways to Differentiate Yourself from every other CPA in your town
- Crushing the Competition
- Using Tax Savings Strategies to win the Largest Accounts in town
- Practice Management / Revenue Enhancements
- The Opportunity Wheel

- Building Wealth Preservation Services Into Your Current Practice
- The Two Obligations
- The ATS/CPA Quick Start Guide

Building Wealth Preservation Services Into Your Current Practice

- Why this is so important
- Structuring the business
- Should You Go it Alone or Partner with a Wealth Preservation Consultant (WPC)
- Licensing and Regulatory Requirements
- Maintaining Integrity and Independence
- Our Mentoring Program

Competition Elimination System

- Stemming the Tide of Defections
- Crushing H&R Block, Turbo Tax, and Liberty Tax Services
- Why Your Best Clients want you offer financial services
- How to Capitalize on any recent event, tax law change or trend
- Why 99% of CPAs don't know this stuff

Practice Management/Legal Issues

- Legal Issues for Accountants and Advisors
- How to Bullet Proof Your Practice
- America's IRA ExpertsTM 10-Point Malpractice Checklist
- America's IRA ExpertsTM Waivers and Releases Suite

Client Communication Process

- Putting Your Plan Together
- The Announcement Letter
- The Retirement Planning Checklist
- ATS Consumer Inserts
- Newsletters
- White Papers
- Red Flag Letters
- Planning Client Events
  - IRA / IOU
  - Baxter
  - Conversations With…
- The 5 Step Process
- Client Engagement Process
  - The 3 Interview Phases
  - What are we promoting
  - Overview of Process - Chart
  - Client Input Forms
- Developing Your Client Communication Plan
- Client Communications
  - – Educational Workshops
  - – Special Events Club
  - – Newsletters
  - – White Papers
  - – Special Reports
  - – Website
  - – Webinars
- Branding Considerations
  - – Signage
  - – Stationary
- Leveraging The Rules To Demonstrate Expertise

Client Educational Workshop Logistics

Mechanics

- Transferring Your IRA to The Perfect IRA
  - IRC Section 1035
- The Money Movement Process
- The 1040 Overlay

The World of Retirement Products /Product Selection

- Best in Class Strategy

Next Steps

- Your ATS Agreement
- Starting the 90-Day Plan
- Webinar List and Educational Steps