

# ***All You Need To Know About the Incredible New Opportunities to Preserve Wealth in 2010***

***If You Have an IRA or Retirement Plan Worth \$100,000 or More,  
You and Your Family Could Gain \$1,000,000. We'll Explain How!***

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## **What You'll Learn:**

- How you can now benefit from Roth IRA conversions—even if you thought you were too old or had too much income.
  - New opportunities for wealth preservation for older and high income IRA owners.
  - How to protect yourself from a decline in your Roth IRA.
  - A little-known technique for making a Roth IRA conversion while legally avoiding certain taxes (this alone will make the workshop worthwhile)!
  - Peer-reviewed proof of the benefits of Roth IRA conversions.
  - Accumulation strategies with Roth IRAs and Roth 401(k)s if you are still working.
  - The best estate plan for most IRA and retirement plan owners.
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*Your presenter is nationally recognized IRA, Roth IRA conversion and retirement plan expert Jim Lange, CPA/Attorney and founder of The Roth IRA Institute™. (Please turn the page for details).*

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## ***Workshop Information***

**Saturday, February 20, 2010**

9:30 – 11:30 AM or 1:00 – 3:00 PM

**Doubletree Hotel • Monroeville Convention Center  
101 Mall Boulevard • Monroeville, PA 15146**

Workshop is FREE, but seating is limited. Refreshments will be served.

### **Two Bonuses For Attending**

Attendees receive a FREE copy of Jim's 2nd edition of *Retire Secure!*—acclaimed by Larry King, Charles Schwab, Jane Bryant Quinn, and over 60 financial planners nationwide. Jim will be happy to autograph your copy after the workshop.

New Attendees also receive a personalized "IRA Strategy Review" with Jim – a \$500 value!

**For Reservations (Phone Answers 24 Hours):**

**Call 1-800-748-1571**

## 2010 Opens Up an Unprecedented Opportunity for Tax-Free Wealth Preservation

A dynamic wealth-building opportunity is opening up in 2010! For many, if not most, high income IRA and retirement plan owners, Roth IRA conversions have been off their radar because of the old \$100,000 income limit. With this restriction lifted in 2010, high-income earners need to find out whether a Roth IRA conversion could benefit their family, and if so, how much should be converted and when.

If your income is consistently over \$100,000, the benefits for your family of a Roth IRA conversion in 2010 can be measured in MILLIONS of dollars. You owe it to yourself and your family to explore whether a Roth IRA conversion of at least a portion of your IRA or retirement plan is appropriate. If so, how much should you convert? When should you convert? Should you make a series of Roth IRA conversions? Come to this workshop for the answers.

### Learn the Benefits of Lange's Renowned *Cascading Beneficiary Plan*™

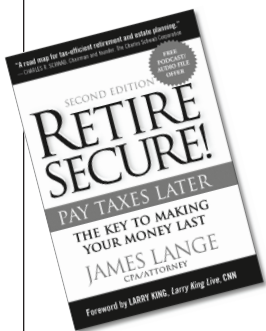
In 1998, Jim Lange created a shockwave in the financial industry when he introduced his Cascading Beneficiary Plan™. It quickly became—and has remained—the best estate plan for most IRA and retirement plan owners. For IRA and retirement plan owners with a traditional family (husband and wife who share the same children and/or grandchildren and who trust their spouse), Lange's Cascading Beneficiary Plan™ is the best estate plan legally available in this country. The key is maximum flexibility in your estate plan. Find out how you can benefit from Lange's Cascading Beneficiary Plan™.



#### About Your Presenter

Jim Lange, CPA/Attorney, is a nationally known IRA and retirement plan distribution expert. With over 30 years of experience practicing in Pittsburgh, Jim currently charges \$10,000/day to financial firms to make basically the same presentation he will present to you for free.

Jim's recommendations have appeared 30 times in *The Wall Street Journal*, 23 times in the *Pittsburgh Post-Gazette*, *The New York Times*, *Newsweek*, *Money Magazine*, *Smart Money* and *Reader's Digest*. His articles have appeared in *The Journal of Retirement Planning*, *Financial Planning*, *The Tax Adviser (AICPA)*, *Bottom Line* and other top journals.



The second edition of *Retire Secure!* is available now at book stores everywhere. It includes testimonials from Charles Schwab, Jane Bryant Quinn, and has received rave reviews from over 60 financial professionals and authors. Ed Slott wrote the introduction, and Larry King wrote the foreword.

*“Retire Secure! 2nd Edition* covers two areas particularly well—Roth IRA conversion and estate planning for IRA owners.”

**Jane Bryant Quinn**  
*Newsweek and Bloomberg.com*

*“In Retire Secure!*, CPA and estate planning attorney Jim Lange provides a road map for tax-efficient retirement and estate planning. This is an invaluable resource for investors and planners alike.”

**Charles Schwab, Chairman and Founder**  
*The Charles Schwab Corporation*