



James Lange Bio

James Lange is the principal of a Pittsburgh based CPA firm, a law firm that concentrates in trusts and estates, and a Registered Investment Advisory firm. Jim is a nationally recognized IRA, 401(k), Roth IRA, Roth IRA conversion and retirement plan distribution expert.

Jim wrote the first major Roth IRA article published in the peer-reviewed **The Tax Adviser**, the American Institute of CPA's tax journal in 1998. Jim recently founded the **Roth IRA Institute™** with the main purpose of sharing his expertise and educating financial advisors and consumers. Jim is "the advisor to advisors." In 2008 alone, Jim has spoken over 20 times to groups of financial professionals around the country.

Jim also developed Lange's Cascading Beneficiary Plan™ which has become the benchmark in IRA distribution planning. Lange's Cascading Beneficiary Plan™ is widely regarded as the gold standard of estate planning for many IRA and retirement plan owners.

Lange's Cascading Beneficiary Plan™ is featured in Jim's best-selling book, **Retire Secure! The Key To Making Your Money Last As Long As You Do** (Wiley 2006). **Retire Secure! The 2nd edition** will be released in February 2009. New material in the 2nd edition includes inherited 401(k) and IRA strategies, Roth IRA strategies for 2010, the importance of making sure that your estate plan considers the rising Federal Tax Exemption and the benefits of using life insurance money for charities. **Larry King**, CNN, has written the foreword for the 2nd edition, America's IRA Expert **Ed Slott** has written the introduction and testimonials have already been offered by **Charles Schwab** and **Jane Bryant Quinn** of **Newsweek**. **Retire Secure! The 2nd Edition** also received testimonials from over 60 additional financial experts.

Jim has been quoted 30 times in **The Wall Street Journal** and his works have appeared in hundreds of financial journals and publications including **Bottom Line**, **Newsweek**, **Kiplinger's Retirement Report**, **The New York Times**, MSNBC, Dow Jones Newswire, Forbes.com, and **Consumer Reports Money Adviser**.

Jim lives in Pittsburgh, in the home he grew up in, with his wife, Cindy, and their 14-year-old daughter, Erica. When Jim is not devising new strategies for retirees to save taxes and accumulate wealth (which is most of the time), he enjoys bicycling, hiking, skiing, and traveling with his family. Jim also plays chess and bridge both online and with his friends.

