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May 25, 2022

Local Financial Advisor Completes Advanced Training from America's IRA Experts at Ed Slott and Company, LLC

Members of Ed Slott's Master Elite IRA Advisor Group℠ Attend Semiannual Workshop on the Latest Retirement Account Planning Strategies, Estate Planning Techniques and Tax Laws

Fruitland Park, FL – May 25, 2022 – Elizabeth Cornell, Certified Annuity Specialist of TB Financial Group completed her semiannual training with America's IRA Experts at Ed Slott and Company, LLC by participating in a workshop that took place May 12-14, 2022. The invite-only workshop was attended by members of Ed Slott's Master Elite IRA Advisor Group℠; it provided in-depth technical training on advanced retirement account planning strategies, tax law changes and estate planning techniques. The workshop also featured a detailed look at the regulations recently released by the IRS in 2022 that provide guidance on many parts of the SECURE Act, which was signed into law December 2019.

"It's been more than two years since the SECURE Act ushered in a new era of retirement planning laws, and we only just received clarity from the IRS to help answer our most pressing questions since the retirement planning landscape was turned on its head," said Ed Slott, CPA, founder of Ed Slott and Company, AARP columnist, Professor of Practice at The American College of Financial Services® and nationally recognized IRA Expert who was named "The Best Source for IRA Advice" by *The Wall Street Journal*. "From surprising new details on the 10-year rule to clarity on which beneficiaries still qualify for a stretch IRA, this latest information from the IRS proves, yet again, just how important it is to be working with a financial professional who is up-to-speed on the latest retirement planning laws and strategies," he continued. "I commend Liz for continuously prioritizing her education throughout this ever-changing retirement planning landscape. she is going above and beyond to deliver informed and accurate financial guidance to her clients in a time when it's needed most. With this ongoing training, Liz can offer the latest insight on any necessary updates one may need now and into the future."

Training highlights from this event include:

- A review of the SECURE Act's impact on both spouse and non-spouse beneficiaries and planning techniques for each
- A look at 72(t) payments including planning options, rules and methods
- A 2022 tax update overview including a look at the IRS's new tax tables and retirement plan contribution limits.

The workshop also included an in-depth look at the IRS's proposed SECURE Act regulations that provide guidance on many parts of the law, including eligible designated beneficiaries (EDBs) with explanations and examples, determining the eligibility of EDBs, successor beneficiaries with explanation and examples, the impact of SECURE Act regulations on trusts and examples, and more. Guest speaker Jeffrey Levine, CPA/PFS, CFP® also gave a special presentation on estate planning themes for 2022 and beyond, while guest speaker Shannon L. Evans, J.D., presented on strategies to avoid estate tax disasters and family feuds. Members of Ed Slott's Master Elite IRA Advisor Group℠ also reviewed relevant, advanced case studies and private letter rulings.

Training was provided by Ed Slott and Company's team of retirement experts, including Ed Slott, CPA; Sarah Brenner, JD; Andy Ives, CFP®, AIF®; Ian Berger, JD; and Shannon Evans, Esq. Ed Slott and Company and many of the advisors in Ed Slott's Master Elite IRA Advisor Group℠ are the go-to resources for attorneys, CPAs and other financial advisors because of their intimate knowledge and advanced expertise in all areas of retirement accounts and distribution planning. This workshop also provided approved continuing education (CE) credits through The American College, CFP® Board, IRS and NASBA for retirement savings and income planning, federal tax law topics, general financial education, and accounting.

Members of Ed Slott's Master Elite IRA Advisor Group℠ have year-round access to Ed Slott and Company's team of retirement experts for consultation on a variety of advanced planning topics. The membership also includes workshops, webinars, tax-law updates, step-by-step processes, such as the Complete IRA Care Solution™ 30-module planning guide, and so much more. Members also have access to proprietary worksheets, pamphlets and presentations, including a 7-step checklist for IRA trust planning after the SECURE Act, gift planning presentation, and tips to disarm the new retirement savings time bomb as seen in Ed Slott's latest best-selling book and public television special that they can use when working with clients.

"Retirement planning laws and regulations are ever-changing and now, with talks of the so-called 'SECURE Act 2.0' making its way through Congress, we can anticipate ever more changes in the near future," said Liz. "Through my membership with Ed Slott and Company, I am confident in my abilities to serve the best interests of my clients as news continues to break, always equipped with the latest retirement laws and strategies and back-office support team."

"With ongoing changes to the laws, policies and regulations surrounding retirement planning it's crucial for people to work with a financial professional who commits to ongoing education and maintaining the knowledge required to guide their clients through this new retirement planning era," said Slott. "Advisors who fail to invest in their own education may make costly and irreversible mistakes on behalf of their clients. Our mission is to educate advisors so that they can help their clients make informed decisions about their financial futures."

Elizabeth Cornell can be contacted for more information on IRA and retirement-related questions. Please visit www.tbfinancialgroup.com or call (352)350-1161.

ABOUT ED SLOTT AND COMPANY, LLC: *Ed Slott and Company, LLC is the nation's leading provider of technical IRA education for financial advisors, CPAs and attorneys. Ed Slott's Elite IRA Advisor Group℠ is comprised of 500 of the nation's top financial professionals who are dedicated to the mastery of advanced retirement account and tax planning laws and strategies. Slott is a nationally recognized IRA distribution expert, best-selling author and professional speaker. He has hosted several public television specials, including "Ed Slott's Retirement Freedom!" and released his latest book, "The New Retirement Savings Time Bomb," in March 2021. Visit irahelp.com for more information.*

For more information on TB Financial Group – visit www.TBFinancialGroup.com or contact the office at 352.350.1161.