

**Introduction for Consumers**  
**James Lange, CPA/Attorney**

Our speaker today is Jim Lange. Jim is President of 3 interrelated companies that provide financial services to IRA and retirement plan owners. Jim is the founding President of a CPA firm that does tax planning and preparation. The second company Jim started is a law firm that limits its practice to estate planning and the drafting of wills and trusts and beneficiary designations of IRAs and retirement plans. The third company is a registered investment advisory firm that provides cutting-edge Roth IRA conversion strategies and conservative money management. All 3 companies are located in Squirrel Hill/Pittsburgh where he has been practicing for the last 30 years.

Jim is a nationally-recognized IRA, Roth IRA conversion, 401(k) expert. Jim speaks around the country for insurance and mutual fund companies at the rate of \$10,000 a day to present to financial professionals essentially the same information you will hear today. Jim also founded the Roth IRA Institute™ to help financial professionals and IRA and retirement plan owners to get the most from their retirement plans with Roth IRA conversions as an integral planning strategy.

Jim is the author of two editions of the best seller, ***Retire Secure! Pay Taxes Later***. Larry King wrote the foreword for the book and Ed Slott wrote the introduction. ***Retire Secure!*** enjoys glowing testimonials from the industry's best: Charles Schwab, Roger Ibbotson, Jane Bryant Quinn and 60 other financial professionals. And just out, is Jim's newest book, ***The Roth Revolution: Pay Taxes Once and Never Again***. This bestseller has also been acclaimed by the industry top experts and has a compelling foreword written by "America's IRA Expert", Ed Slott.

In addition to publishing ***Retire Secure!***, Jim's articles and recommendations have appeared over 30 times in the Wall Street Journal, 23 times in the Pittsburgh Post Gazette and hundreds of other top journals. His estate planning solution that you will learn about today, "Lange's Cascading Beneficiary Plan" has been featured in *Financial Planning* magazine, *The Tax Advisor*, *Kiplinger's* and *the Wall Street Journal*

With that, please join me in welcoming Jim Lange.