

Introduction for CPAs, Attorneys and Financial Advisors

James Lange, CPA/Attorney

Our speaker today is Jim Lange. Jim is President of three 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. The third company is a registered investment advisory firm that provides cutting-edge Roth IRA conversion strategies and conservative money management. All three companies are located in Pittsburgh where he has been practicing for the last 30 years.

Jim is a nationally recognized IRA, 401(k) and Roth IRA Conversion expert. Recently, Jim also founded the Roth IRA Institute™ to help financial professionals such as yourselves and IRA and retirement plan owners to get the most from their retirement plans and 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 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. Charles Schwab calls ***Retire Secure*** a road map for tax-efficient retirement and estate planning. Jane Bryant Quinn said that ***Retire Secure!*** covers two areas particularly well – Roth IRA conversions and Estate Planning for IRA owners, the two areas Jim will be covering today.

In addition to publishing ***Retire Secure!***, Jim's articles and recommendations have appeared over 30 times in the Wall Street Journal and his estate planning solution, "Lange's Cascading Beneficiary Plan" has been featured in *Financial Planning* magazine, *The Tax Advisor*, *Kiplinger's*, *the Wall Street Journal* and hundreds of other sources.

Please join me in welcoming Jim Lange.