



NATIONALLY RECOGNIZED IRA, 401(k) & ROTH IRA CONVERSION EXPERT

## JAMES LANGE, CPA

CPA & Registered Investment Advisor

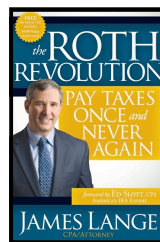
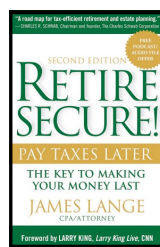
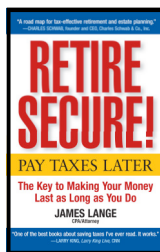
Jim Lange, CPA, is the President of 2 interrelated companies that provide financial services to IRA and retirement plan owners. Jim is the founding President of a CPA firm that does tax planning and preparation. The second company is a Registered Investment Advisory firm that provides cutting-edge Roth IRA conversion strategies and conservative money management. The companies are located in Pittsburgh where he has been practicing for the last 30 years.

Jim is a nationally recognized IRA, 401(k) and retirement plan distribution expert and is the Founder of The Roth IRA Institute™. The Roth IRA Institute helps 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 of CNN 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."

Jim is also the best-selling author of *The Roth Revolution: Pay Taxes Once and Never Again*. Ed Slott, "America's IRA Expert" wrote the foreword and said "The Roth Revolution offers readers proven solutions for minimizing taxes and shows, step-by-step, how to build tax-free wealth for generations."

In addition to publishing *Retire Secure!*, Jim's articles and recommendations have appeared over 30 times in *The Wall Street Journal*, 24 times in the *Pittsburgh Post Gazette* and his famed estate planning solution, "Lange's Cascading Beneficiary Plan" has been featured in *Financial Planning* magazine, *The Tax Adviser*, *Kiplinger's* and *The Wall Street Journal*.



### PRIOR SPEAKING ENGAGEMENTS

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# JAMES LANGE, CPA

## Keynote Speaking Testimonials

Jim Lange's seminar for our Investment Executives on Roth IRAs and estate planning was excellent. He simplified complex issues and provided clear and concise answers to technical questions. I received many positive comments about his presentations.

William O'Donnell, Senior Vice President, Parker/Hunter

The Tri-State Tax Institute each year invites notable speakers in regard to current tax issues. Mr. Lange was recently requested to return for a second year by virtue of his high ratings on participants survey sheets. The audience of lawyers, CPAs, CFPs and insurance agents highlighted not only his timely topics, but his excellent manner of presentation. I would highly recommend Mr. Lange for his professionalism and knowledge.

Chris Freeman, Director, Tri-State Tax Institute

The presentation was one of the most outstanding we have had in the 4 years we have been meeting. Questions from the audience were repeated so that everyone could hear and then answered completely. The audience agreed that the presentation was particularly useful. We plan on inviting Mr. Lange back to give a follow-up presentation to provide an update with the latest information.

Parvin Lippincott, SURE Coordinator, Westinghouse

Thank you for speaking before the professional development staff of the University of Pittsburgh. Your presentation on the "greedy givers" and the benefits of using retirement assets to fund charitable giving remainder trusts will be very helpful to our development team as they work with their planned giving prospects. We appreciate your professionalism and expertise.

Larry Karnoff, JD, CFRE, Director of Planned Giving  
University of Pittsburgh

I wanted to thank you for your participation in our first Tax Talk University. The feedback we received was tremendous and we have signed up several of the attendees for both Gradient Tax and Gradient Insurance, so thank you for your assistance. I spoke with an advisor specifically that had been to multiple Ed Slott events, Natalie Choate, as well as others and told me the information you delivered regarding IRA's and the overall presentation was far superior to anything he had encountered previously! Kudos to you! Thank you again for your participation and I look forward to working with you in the future.

Jeff Quick, Vice President, Gradient Tax, LLC

Jim's presentation was well-organized and supported by graphs, charts and summarized material was easy to follow which he furnished to all of us. A stream of questions were directed to the speaker by attentive tax specialists. Due to the complexity of the subject we hope that Jim will agree to meet with us again.

Regis Obringer, President, PA Society of Public Accountants

Over the years I've attended dozens of financial "seminars" with advance claims to astonishing benefits. I have never been so impressed. The workshop was focused exactly on the advance mailing and it delivered the goods. Your book was an easy read and I'll read it again. Again, thank you to opening my eyes to Traditional and Roth IRA possibilities.

Unsolicited testimonial from public workshop participant

Additional testimonials, references and speaking evaluation results can be found on [www.rothira-advisor.com](http://www.rothira-advisor.com).