



### **James Lange, CPA, Attorney, Registered Investment Advisor**

Jim Lange's tax and estate planning strategies have been endorsed by *The Wall Street Journal* (36 times). He has written 8 best-selling books, some endorsed by the country's top financial experts. His newest book is *The IRA and Retirement Plan Owner's Guide to Beating the New Death Tax: 6 Proven Strategies to Protect Your Family from The SECURE Act*.

Jim's RIA oversees \$750 million under management. Jim's law firm has completed 2,857 estate plans includes wills, trusts, and beneficiary designations of IRAs and retirement plans. Jim's CPA firm still prepares 760 tax returns annually.

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## **Prior Speaking Engagements**

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### **For Legal Professionals**

Pennsylvania Bar Institute:

- 2 CLE courses annually (2013 - Present)

PA Association of Elder Law Attorneys

Tax Section of the American Bar Association

2000 Financial & Estate Planning Seminar

The Tax and Estate Planning Forum

Allegheny County Bar Association

Estate Planning Council of the Upper Ohio Valley

Tri-State Estate Planning Conference

South Central PA Estate Planning Council

Northeast Estate Planning Council

Washington County Bar Association

Westmoreland County Bar Association

Somerset County Bar Association

Allegheny County Counselors Association

### **For Academics and Universities**

Carnegie Mellon University:

- Academy of Lifelong Learning (5-week course)

University of Pittsburgh @ Johnstown

Indiana University of PA

Robert Morris University

New York University Retirement Conference

Duquesne University

Association of University People

Juniata College (2001, 2002 and 2005)

Harvard Princeton Yale Club

Pittsburgh Federation of Teachers Retiree Chapter

### **For Tax Professionals**

PICPA

- 2021 Personal Financial Planning Conference
- Western PA Tax Conference

Western CPE

AICPA National Conference of Federal Taxes

National Business Institute

Professional Education Systems, Inc.

42nd Annual Tri-State Tax Institute

43rd Annual Tri-State Tax Institute

PA Society of Tax and Accounting Professionals

PA Society of Public Accountants

Allegheny Tax Society

Illinois Institute of CPAs

Michigan Institute of CPAs

New York Institute of CPAs

West Virginia Society of CPAs

Gradient Tax, LLC

Herbein & Company, CPAs

### **For Banking Professionals**

WesBanco

### **For Insurance Professionals**

The National Association of Insurance and Financial Advisors

National Insurance Marketing Executives

Pittsburgh Life Underwriters Association

Transamerica Life

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## Prior Speaking Engagements

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### For Investment Advisors

Lincoln Financial Advisors  
Financial Principles, LLC  
Smith Barney  
WRP Investments  
Edward Jones  
Covenant Reliance Partners  
Gitterman & Sacks  
ING  
TD Waterhouse Institutional Services  
Parker/Hunter Incorporated  
WRP Investments  
Bill Few Associates, Inc.  
ING/Aetna Financial Services  
AXA Advisors  
T.D. Waterhouse  
Conseco Fund Group  
Merrill Lynch  
Washington Square Securities, Inc.

### For Financial Planners

Financial Planning Association:  
• Journal in the Round  
• Retirement Planning Conference  
18th Annual Pittsburgh Financial Planning Symposium  
Financial Planning Association of Pittsburgh  
Financial Planning Association of Nebraska  
Financial Planning Association of Michigan  
Financial Planning Association of Central PA  
Financial Planning Association of Virginia Beach

### For Human Resource Associations

Westmoreland Human Resources Association  
WEB Network of Benefit Professionals  
Butler Human Resources Association  
Pittsburgh Human Resources Association

### For Retiree Groups/Miscellaneous

Omaha World-Herald Personal Investment Conference  
American Association of Individual Investors,  
Pittsburgh Chapter  
Westinghouse SURE (*Service Uniting Retired Employees*)  
General Motors Retirees Group  
St. Francis Hospital  
East Suburban Dental Society  
Bechtel Bettis, Inc.  
Association of Information Technology  
Jewish Community Center  
Tri-State Association of Physicians of Indian Origin  
Women Investing Money  
Hindu Jain Temple  
Organization of Chinese Americans  
Chinese Friendship Club  
Northmont Brotherhood  
Lutheran Brotherhood  
Saint Barnabas  
The Devonshire of Mt. Lebanon  
Friendship Village  
Carnegie Library Center  
Pleasant Hills Retired Men's Group  
St. Gabriel's Men's Club  
Good Guys Luncheon  
Rotary Clubs of Pittsburgh and Fox Chapel