



Work with a Member of Ed Slott's Elite IRA Advisor GroupSM Today!

Ed Slott and Company is the nation's leading source of accurate, timely IRA expertise and analysis to financial advisors, institutions, consumers and media across the country. Ed Slott began Ed Slott's Elite IRA Advisor GroupSM in 2005 with the goal of matching consumers with competent, trained advisors and retirement professionals. Since then, this private study group has grown to nearly 500 members across the country, armed with current, cutting-edge IRA information to help service their clients and their clients' families.

Members of Ed Slott's Elite IRA Advisor GroupSM train with Ed Slott and his team of IRA Experts on a continuous basis. These advisors pass regular background checks, complete requisite training, attend semiannual workshops and complete mandatory examinations. They are immediately notified of changes to the tax code and updates on retirement planning, so you can be sure your retirement dollars are safe from unnecessary taxes and fees. Additionally, members have access to us, America's IRA Experts to answer any tough questions or planning needs.

Retirement planning is complicated, and you need an IRA specialist in this area. It is a personal and situational endeavor with possible pitfalls in the way of success. Work with a financial professional who invests in his / her education to eliminate risk and keep more of your retirement dollars for you and your family.

What makes an advisor from Ed Slott's Elite IRA Advisor GroupSM different?

- Our group encompasses a range of financial advisors, CPAs, estate planning attorneys and insurance agents
- These high-caliber advisors are investing over \$10,000 per year toward IRA education to help their clients
- Members are specialists in retirement distribution planning

Membership in Ed Slott's Elite IRA Advisor GroupSM means having:

- Semiannual IRA educational workshops per year with Ed Slott and his team of IRA Technical Experts, along with guest speakers from Ed Slott and Company's network of expert colleagues
- Instant access to a wealth of resources ONLY for members of Ed Slott's Elite IRA Advisor Group, including Ed Slott and Company's custom-designed modules – diagnostic checklists that advisors can use to ensure their clients' IRAs are set up and maintained correctly
- Immediate updates via email, webcasts and videos on the latest changes to IRA tax laws
- 24/7 access to our Experts to confer with on complex cases. In 2025 alone, we were able to answer over **5,000** questions for our members that directly serviced their clients.
- A network of the top financial advisors in the country

Find an a member of Ed Slott's Elite IRA Advisor GroupsSM in your area today at irahelp.com/find-advisor

Call: 800-663-1340 Visit: irahelp.com/elite E-mail: elite@irahelp.com

Our mission is to continuously provide you the latest IRA education and actionable business-building resources to showcase your expertise. Please e-mail matt@irahelp.com, call (717) 495-7542 or visit irahelp.com/elite to explore or discuss your membership benefits.