FOR IMMEDIATE RELEASE
June, 2017
Jacki Garra – 904-471-6444

Local Financial Advisor Receives Advanced Training from America's IRA Experts at Ed Slott and Company, LLC

Ed Slott's Master Elite IRA Advisor Group℠ Trained on Latest Retirement Account Planning Strategies, Estate Planning Techniques and New Tax Laws at Semiannual Workshop

ST. AUGUSTINE, FL - May 2017 – FRANK BENISCHECK, PRESIDENT of TOTUS TUUS CONSULTING INC completed his semiannual training from America's IRA Experts with Ed Slott and Company, LLC in Kansas City, Missouri May 18-20, 2017. The workshop, which was attended by members of Ed Slott's Master Elite IRA Advisor Group℠, provided in-depth technical training on advanced retirement account planning strategies, estate planning techniques, and new tax laws, including an emphasis on tax reduction methods for retirees as they transition into the distribution phase of retirement.

"Taxes are the single biggest factor impacting a nest egg in retirement, but many fail to realize the importance of mitigating taxes as you begin withdrawing money from your retirement account(s). Many advisors say they are retirement planning specialists, but few have received specialized training in how to manage taxes during the distribution phase of retirement," said Ed Slott, CPA, founder of Ed Slott and Company and a nationally recognized IRA expert who was named "The Best Source for IRA Advice" by *The Wall Street Journal*. "I commend Benischeck, who has been associated with our advanced training program for seven years, for staying current with his retirement planning education so that he can best serve his clients as they transition into retirement."

Highlights from this event included: estate tax reduction strategies; advanced IRA trust planning, including strategies to help protect clients' assets; charitable IRA rollovers; retirement account beneficiary planning, including common mistakes to avoid when naming a spouse or non-spouse beneficiary; inherited IRAs and spousal rollovers, tax planning for investment income; Roth conversions and IRA withdrawal strategies; strategic senior planning; and advanced case studies and rulings on personal loan guarantees and the disqualification of IRAs, the risk involved with nonconventional IRA investments, efficient income streams, including the differences between reverse mortgages and annuities, naming trusts as IRA beneficiaries, the tax implications of poor IRA planning, and more.

Training was provided by Ed Slott and Company's team of retirement experts, including Ed Slott, CPA; Jeff Levine, CPA/PFS, CFP®; Beverly DeVeny; and Sarah Brenner, JD and included a review of case studies and rulings that impact IRAs and retirement planning overall. Ed Slott and Company's team of retirement experts, along with many of the advisors in Ed Slott's Master Elite IRA Advisor Group℠, are the go-to resources for attorneys, CPAs and other financial advisors because of their in-depth knowledge and expertise in all areas of retirement account and income planning.

Members of Ed Slott's Master Elite IRA Advisor Group℠ receive year-round access to Ed Slott and Company's team of retirement experts for ongoing advanced planning support, as well as step-by-step processes, including the Complete IRA Care Solution™ 33-module planning guide, worksheets and pamphlets, including *The Definitive Guide to Required Minimum Distributions for Baby Boomers*, and more to use when working with clients.

"After attending this training workshop, I am excited to return home to St. Augustine knowing that I am up-to-speed on the latest information in tax and retirement account planning and can serve my clients and community with advanced planning strategies. Ed Slott and Company's team of retirement experts provides me with in-depth training and extensive coverage of advanced case studies, which enables me to apply my knowledge and skill set when facing real-world scenarios. With this specialized, hands-on training, I am confident in my ability to provide my clients with accurate, up-to-date advice," said Benischeck.

"Now more than ever, it's important that people are working with financial professionals who have specialized knowledge and training in what I call the 'second half of the game': the distribution phase of retirement," said Slott. "Advisors not specifically trained in the intricacies of advanced planning may not understand how to effectively build an exit strategy for their clients' assets and may fail to create a plan that will get them *through* retirement. Members of Ed Slott's Master Elite IRA Advisor Group℠ receive specialized training on the latest distribution strategies for building a reliable retirement income, allowing them to better assist their clients with protecting their assets and maximizing their life savings."

Benischeck can be contacted for more information on IRA and retirement-related questions.
Please visit www.TTCAdvisors.com or call (904) 471-6444

ABOUT ED SLOTT AND COMPANY, LLC: *Ed Slott and Company, LLC is the nation's leading provider of technical IRA training for financial advisors, CPAs and attorneys. Membership in Ed Slott's Elite IRA Advisor Group℠ is limited to the top financial professionals in the United States, with nearly 400 professionals dedicated to the ongoing training and mastery of advanced retirement account and tax planning laws and strategies. Mr. Slott is a nationally recognized IRA distribution expert, best-selling author, professional speaker, and host of several public television specials, including "Ed Slott's Retirement Road Map!" Visit http://www.irahelp.com for more information.*

ABOUT TOTUS TUUS CONSULTING: *Totus Tuus Consulting (TTC) was created for relationships. Offering a personal and caring approach, TTC helps people work through a process that is too commonly confusing and difficult: retirement planning. In a world that becomes more sterile each and every day, at TTC clients are treated like family. The TTC team enjoys relationships and their clients never feel like a corporate number. Many Americans desire to leave a legacy to the people and organizations they love and respect. Having the necessary assets however, is only the beginning. At Totus Tuus Consulting, knowledge meets innovation and new opportunities for your legacy are unveiled. With world-class consultation our clients are able to protect their estate, reduce taxes and accomplish more than they thought possible. Creativity is central at TTC – the status quo is unacceptable. Totus Tuus Consulting helps you navigate the decisions that come when planning for retirement and ensures that your needs are met in every area retirement affects, including: legal, accounting and financial. Coordination among these disciplines creates synergy and a better end result. TTC limits the number of clients they advise in order to provide this holistic and personal approach, a service unparalleled in the industry. Contact us at 904-471-6444 or visit our website at TTCAdvisors.com.*