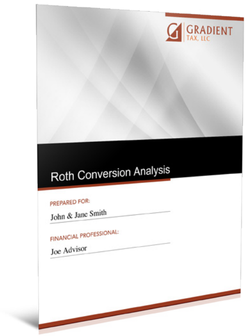
WEB **EXTRA**

ROTH
CONVERSION

See gDrive
to download
sales system



The removal of the income limitation on Roth IRA conversions in 2010 opened up the flood gates to 13.5 million households with modified adjusted gross incomes over $100,000. The benefits provided by Roth IRAs and the anticipated rise in income tax rates make this the perfect storm of opportunity. Our team of CPAs will analyze your clients' and prospects' qualified plans and IRAs to help them make informed decisions and answer the all important question, "Is a Roth Conversion Right for Me?"

GET THE FACTS

- Program Checklist
- Training Video
- IRS Publication 575 Highlight Guide

PROFESSIONAL PROSPECTING TOOLS

- Mini-Seminar Presentation Slides and Complete Script
- Appointment Request Card
- Direct Mail Piece
- Sales Flyer
- Two (2) Prospecting Letters
- Consumer Video
- Coupons and Discount Certificates
- Calls to Action and Third-Party Credibility
  - CPA-Prepared Roth Conversion Report
  - Stretch Roth IRA vs Stretch Traditional IRA Report

POINT-OF-SALE PRESENTATION

- Roth Conversion Consumer Brochure
- Gradient Tax Consumer Brochure
- Data Intake Form
- Client Engagement Letter
- Secure and Simple Electronic Submittal
- Personalized Roth Conversion Report
- Stretch Roth IRA vs Stretch Traditional IRA Report

POWERFUL THIRD-PARTY RECOMMENDATION

- CPA Recommendations, Providing Unbiased Third-Party Opinion from a Fiduciary
- Personalized CPA-Prepared Letter