



## FPA Philly presents Natalie Choate A Workshop

**March 25, 2010**

Crowne Plaza Hotel  
260 Mall Blvd., King of Prussia, PA 19406

12:00 p.m.—4:00 p.m. (lunch included)  
3 CFP CE's approved (3 PA & DE Insurance CE's pending)

**11:45 a.m.—Registration**

**12:00 p.m.—Lunch will be served**

**1:00 p.m.—Workshop begins**

We are pleased to announce that Natalie Choate will be coming to speak to our chapter. We have successfully wooed the undisputed IRA expert to host this special IRA Workshop! This event is also special because it's our first-ever luncheon/half-day workshop! You asked for it and we're delivering! No traffic to deal with....coming or going! You will receive lunch **PLUS** three CFP & Insurance CE credits **PLUS** get to hear Natalie Choate's expert advise **PLUS** receive Natalie's special 114 page handout for the **low, low price of \$35!!** Where else could that happen?

This is a major benefit to your FPA membership. Normally you would have to pay for an expensive conference and travel to a far away city to have the opportunity to attend one of Natalie's Workshops. We are providing this for you right in your backyard at a nominal price. Your local FPA Chapter is focused on bringing you top notch speakers and quality events to help you **learn, network and grow**. It's been a long winter—get out of the office and invest a Thursday afternoon to keep you on the cutting edge of the most recent strategies and tax laws changes in the IRA area—**You deserve it!**

### **Session I—"Roth Ready for 2010" (1 hour)**

Roth IRA's offer tax-free distributions and no required distributions during the participant's life. Starting in 2010, Roth IRAs will be available even to high-income clients. To help you advise your clients regarding this significant planning opportunity, Natalie will explain all the rules and give her expert tips regarding Roth plans.

### **Session II—"The 194 Best & Worst Planning Ideas for Your Client's Retirement Benefits" Over 194 Great, Not So Great, and Truly Terrible Ideas, Summarized and Rated (2 hours)**

Your clients are bombarded with dreams and schemes designed to reduce the tax value of their retirement plans. Learn which ideas work, which ones probably don't, and which will win your client a midnight visit from the IRS. Plus, learn the tried and true estate planning practices, the nifty distribution tricks used by those in the know, and cutting edge ideas for the daring.

Seminar outline provides a handy checklist of almost 200 ideas—what each idea is, whether it works or not and where to find out more details; plus, thumbnail "client profiles", so the reader can go right to the ideas that his/her clients should consider.

You will receive (free of charge) Natalie's 114 page handout "194 Best & Worst Planning Ideas". The handout summarizes 194 planning ideas your clients should consider (or avoid) for their IRAs, 401 (k)s and other retirement plans.

#### Registration Form

Name: \_\_\_\_\_ Company: \_\_\_\_\_

Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Members: \$35 Non-Members \$60 Students \$15 (must be full-time students)

Make check payable to FPA Philadelphia and mail to: P.O. Box 38, Fairless Hills, PA 19030.  
To pay by credit card go to [www.fpaphilly.org](http://www.fpaphilly.org) and click on the calendar link on the home page.

Cancellation Policy: 48 hours notice required to [ccstewart@comcast.net](mailto:ccstewart@comcast.net) for refund. No-shows will be billed. If you have any questions, please contact Chris Stewart at 215-295-0729.