



**FOR IMMEDIATE RELEASE**

May 17, 2024

R.W. Rogé & Company, Inc.

**Local CEO Completes Advanced Training from  
America's IRA Experts at Ed Slott and Company, LLC**

*Members of Ed Slott's Elite IRA Advisor Group<sup>SM</sup> Attend Semiannual Workshop on the Latest Retirement Account Planning Strategies, Estate Planning Techniques and Tax Laws*

BEVERLY, M.A. – May 17, 2024 – Steven M. Rogé, Chief Investment Officer and CEO of R.W. Rogé & Company, Inc. completed his semiannual training with America's IRA Experts at Ed Slott and Company, LLC by participating in a workshop on May 9-10, 2024. The invite-only workshop was attended by members of Ed Slott's Elite IRA Advisor Group<sup>SM</sup>; it provided in-depth technical training on advanced retirement account planning strategies, tax law changes, and estate planning techniques. The workshop also featured the latest updates on the SECURE 2.0 Act provisions that are taking effect in 2024 as well as an overall "schemes and scams" theme where guest speakers discussed various scams to be aware of.

"As new laws and policies continue to go into effect, the landscape of retirement planning continues to shift, presenting both opportunities and complexities which result in more confusion than ever before for many Americans. This has ultimately raised the demand for heightened attention from both consumers and advisors alike when it comes to financial planning," said Ed Slott, CPA, founder of Ed Slott and Company, Professor of Practice at The American College of Financial Services<sup>®</sup>, and nationally recognized IRA Expert, who was named "The Best Source for IRA Advice" by *The Wall Street Journal*. "In this environment of perpetual change, advisors play a crucial role as guardians of financial security," he continued. "I commend Rogé for continuously prioritizing his education and going above and beyond to deliver informed and accurate financial guidance to his clients in a time when it's needed most. With this ongoing training, Rogé can be ahead of the latest legislative developments and innovative strategies to empower clients to navigate the evolving terrain of retirement planning with confidence and clarity."

Training highlights from this event include:

- An updated look at the SECURE 2.0 Act, including provisions that take effect in 2024 such as:
  - Three new ways to potentially access retirement dollars while avoiding the 10% early distribution penalty (emergency expenses, domestic abuse, and "in-plan emergency savings accounts").
  - 529-to-Roth IRA rollovers.
  - The ability to exempt Roth plan dollars – like in a 401(k) – from the lifetime required minimum distribution (RMD) calculation.

- An advanced look at Roth SEP plan and Roth SIMPLE plan contributions as both were available in 2023 due to the SECURE 2.0 Act; however, the actual implementation proved difficult for many.
- “Red flag” scams to avoid including:
  - Using multiple entities to conceal illegal transactions within an IRA.
  - Making unrealistic claims.
  - Using legal tax breaks to make an investment opportunity sound legitimate.
- A comprehensive IRA update on the latest IRA tax laws changes, new tax strategies, rulings, court cases and planning opportunities.
- A special presentation by guest speaker Robert Powell, CFP®, RMA®, Editor/Publisher of Retirement Daily on TheStreet discussing safeguarding wealth and navigating today's most perilous scams and schemes.

Guest speaker Joseph Clark, CFP®, with Financial Enhancement Group Trust Services hosted a breakout session on legacy plans, while guest speaker David Hays with Comprehensive Financial Consultants, hosted another breakout session on creating and maintaining a great business. Guest speaker Shannon L. Evans, J.D. presented on how to stress test estate plans. Members also reviewed relevant, advanced case studies and private letter rulings.

A special presentation was also made announcing the upcoming release of Slott’s new, highly anticipated book, “The Retirement Savings Time Bomb Ticks Louder.” Currently available for preorder, the book is the ultimate guide to reclaiming control of your financial future and keeping more of your money—no matter what Congress comes up with next. With fully up-to-date information, including updates stemming from the SECURE 2.0 Act, this book provides an easy-to-follow plan that is an entertaining and informative must-read for any American with a retirement savings account. Readers are encouraged to visit [irahelp.com/timebomb](http://irahelp.com/timebomb) for a list of retailers and to claim an exclusive bonus video content offer for those who purchase the book during preorder, “*Ed Slott’s Top 5 Biggest Changes Retirement Savers Need to Know Post-SECURE 2.0.*”

Training was provided by Ed Slott and Company’s team of retirement experts, including Ed Slott, CPA; Sarah Brenner, JD; Andy Ives, CFP®, AIF®; Ian Berger, JD; and Shannon Evans, Esq. Ed Slott and Company and many of the advisors in Ed Slott’s Elite IRA Advisor Group<sup>SM</sup> 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 accounts and distribution planning. This workshop also provided approved continuing education (CE) credits through The American College, CFP® Board, IRS and NASBA for retirement savings and income planning, federal tax law topics, general financial education, and accounting.

Members of Ed Slott’s Elite IRA Advisor Group<sup>SM</sup> have year-round access to Ed Slott and Company’s team of retirement experts for consultation on a variety of advanced planning topics. The membership also includes workshops, webinars, tax law updates, step-by-step processes, such as the Complete IRA Care Solution<sup>TM</sup> 30-module planning guide, and so much more. Members also have access to proprietary worksheets, pamphlets, and presentations, including a 7-step checklist for IRA trust planning after the SECURE Act, SECURE 2.0 key effective dates, and tips to disarm the new retirement savings time bomb as seen in Ed Slott’s latest book that they can use when working with clients.

"Retirement planning is always evolving, and this year is no exception," said Rogé. "That's why continuing education remains a top priority for me and my team at R.W. Rogé & Company, Inc.

Being part of this esteemed group allows us to offer our clients unparalleled expertise in IRA planning and strategies, ensuring that we are ahead of the curve on the latest tax laws and retirement planning techniques, and providing our clients with the best possible advice to secure their financial futures."

"I am immensely proud of the dedication displayed by each member of our ongoing study group. In these uncertain times, these top advisors are rising to the occasion, offering invaluable guidance to Americans nationwide," said Slott. "As each year brings an array of new retirement and tax planning laws and policies, our members stand at the forefront of the industry, equipped with the expertise necessary to adeptly navigate their clients through the ever-evolving landscape."

Rogé can be contacted for more information on IRA and retirement-related questions. Please visit [www.rwroge.com](http://www.rwroge.com) or call 631-218-0077.

**ABOUT ED SLOTT AND COMPANY, LLC:** Ed Slott and Company, LLC is the nation's leading provider of IRA education for financial advisors, CPAs, and attorneys. Ed Slott's Elite IRA Advisor Group<sup>SM</sup> is comprised of 500 of the nation's top financial professionals who are dedicated to the mastery of advanced retirement account and tax planning laws and strategies. Slott is a nationally recognized IRA distribution expert, best-selling author, and professional speaker. He is one of the top pledge drivers of all time with his popular public television specials and is also the co-host of *The Great Retirement Debate* podcast, available on all major platforms, including [Spotify](#), [Apple](#), [Stitcher](#), and [Amazon](#). Visit [irahelp.com](http://irahelp.com) for more information.

**ABOUT R.W. ROGÉ & COMPANY, INC.:** R.W. Rogé & Company, Inc. is an independent, fee-only financial planning and investment management firm serving clients locally and virtually across the country, with Long Island, New York, Beverly, Massachusetts, and Naples, Florida office locations. R.W. Rogé & Company, Inc. was founded on a "client first" culture and proudly commits to acting in your best interest as a fiduciary, since 1986. The firm has been recognized as one of the Best Financial Advisors on Long Island by Bethpage Best of LI, one of the Top Advisory Firms by Investor.com, and was named One of Investopedia 100 Top Financial Advisors of 2019. Visit [www.rwroge.com](http://www.rwroge.com) for more information.

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