IRA Summit

IRA Summit Agenda (Tentative)

AMERICA'S™
IRA CENTERS

Introduction to Table Bay

The Ultimate IRA Knowledge Machine

- IRAs, Time, Money, and Taxes
- EGTRRA
- The 3 biggest tax breaks in the internal revenue code
- The power of accumulation
- The power to tax is the power to destroy
- Must-know IRA rules and facts
- Types of inherited IRAs
- The Multi-Generational IRA
- RMDs
- Rollovers
- Choosing a beneficiary
    - Types of beneficiaries
    - Special problems – adoption/step children/blended
    - Per Stirpes, per capita and representation
- Separate Account Rules
- Splitting IRAs
- MDRs – Minimum Distribution Rules
- IRDs – a little known tax break
- NUA – an often missed tax break for 401k participants
- Common mistakes in setting up inherited IRAs
- Prohibited transactions

IRA Update

- Latest rulings, cases, and IRA information you can act on
- FDIC and SIPC protection for IRAs
- Beneficiary form meltdown – the unintended consequence
- Caution when moving IRA funds
- 8 signs that your IRA is broken and how to fix it

Integrating IRAs into the Estate Plan

- Problems with estate planning and trusts – things the client has never heard but needs to
- Important family decisions
- Naming a trust as an IRA beneficiary
- The dumbest thing that estate planning attorneys do
- How to leverage IRAs into powerful estate plans
- Estate Tax and IRAs
- Generation – skipping transfer tax and IRAs

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The Retirement Crisis

- The Longevity Crisis in America
- The Pension Meltdown
- Social Security
  - 4 secret ways to boost social security income
  - How to get social security to pay for the kid's education
- The Invisible Enemy
- The New Retirement Mentality
- Creating sustainable guaranteed streams of income

Bullet Proofing The Nest Egg – The Ultimate Safe Money Solution

- Safeguarding IRAs in turbulent times
- Perfect products for IRA planning
- Products that create sustainable lifetime streams of income
- V U L
- How to Position the Index Annuity – The RESET

Table Bay and You

- Why advisors select Table Bay Financial
- Overview of The Advantage System
- Incentives and business building tools
- What has your FMO done for you lately?

Table Bay Advantage IRA Purple Power Strategies
Use these 5 key strategies to generate compensation in excess of $50,000 per month

- Strategy #1 – Avoiding the retirement tax trap
- Strategy #2 – B.O.S.S.
- Strategy #3 – The AIC Forever IRA™ – Growing their IRA into a family fortune and transferring up to 566% more than they had in the account
- Strategy #4 – Retire without taxes – The Roth 2010 Solution
- Strategy #5 – DBO Program – helping clients achieve their #1 objective for retirement – a guaranteed income stream they can't outlive

Gaining Competitive Advantage

- How to use your IRA expertise to gain competitive advantage and dominate your local market
- Service, Brand, and Relationship
- Relentless Burning Desire / Love Affair Marketing/ Systemization
- The Perfect Storm of IRA Opportunity – How to benefit NOW
- Why IRA distribution planning must be addressed now – why less than ½ of 1% of advisors know anything about this – don't lose clients to the shift from accumulation to distribution planning
- Becoming the local IRA Expert in your community

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- How to eliminate competition and commoditization
- Crush the Competition – 7 Ways to differentiate yourself form everyone else
- Acre of Diamonds – why less than 1% of advisors, bankers, accountants, attorneys, and stock jocks know anything about this
- Competition Elimination
    - Dealing with “Billy” (1-800-Call Fidelity)
    - Getting the prospect to say HELP ME and agree the current advisor CANNOT HELP THEM
    - Ten questions to ask your advisor

Leverage Your IRA

- Where do you think taxes are going
- Your IRA on steroids
- The 80% Tax on IRAs – How to avoid it and how to use it to attract large IRAs
- Double Sale on Roth – Tax rates and market value
- How to convert tax infested dollars into TAX FREE dollars
- Underutilized and overlooked uses of life insurance
- How to motivate clients to implement their IRA/estate plan

Advanced Sales Strategies

- Ask great questions – The 5 Key Questions
- Selling cookies to Girl Scouts
    - Storytelling
    - A Letter to GOD
- The Beneficiary Form Review – Common mistakes that other advisors make on beneficiary forms and how you can use it to capture millions in new IRA assets
- The Custodial Review – How to utilize to disturb long standing relationships with their current custodian
- The Trust Review – showing the client how a trust can do more harm than good when it comes to IRAs – when you should and should NOT use a trust
- Annuity Checklist
- How to use 72t to capture new accounts
- How to capture company IRA plans
- In-Service withdrawals
- How to use the beneficiary form to build referrals
- The Dead Man’s IRA
- Retirement IQ Quiz
- The Perfect Client Profile
- IRA Timeline

Table Bay Advantage Anti-Traditional Sales System

- How to position yourself as an expert on IRAs
    - Your 30 second commercial
- How to get the client to commit to you before solving their problems
- The IRA Sales Process – how to emotionally connect with your prospect
- How to deal with “I want to think about it”

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Becoming the IRA Expert in Your Hometown

- Creating recognition as an IRA Expert in your community
- 7 proven prospecting methods
- Buy them a tax return – win twice!

Best Sales Ideas

The Table Bay Advantage Marketing Plan™
A proven system that turns average prospects into lucrative clients

- Exclusive proven "Neighborhood Marketing" concept
- Increase your income by generating 2400 selling opportunities right in your backyard – a continuous flow of prospects all year long
- How to differentiate yourself in a crowded market
- Reach out and touch someone
    - Outflow = Inflow = Income
- The five pieces of the seminar puzzle and how to fill the room without feeding them
- The Power of Radio
- Client events
- Build your brand – Move your practice from commodity to singularity – The VIPER Strategy
- IRA Marketing Toolbox
- Table Bay Financial Segmentation System
- Maximizing your ROI

Table Bay CPA Advantage Edge Program™
Accountants offer an exceptional source of high quality prospective IRA owners ready to buy

- Five secrets to marketing to CPAs and enrolled agents
- What to say to accountants to gain appointments easily everyday
- What are the 3 critical questions that every CPA must answer
- How to run CPA events designed to get them referring large IRA accounts to you every single day
- Creating a highly effective list of accountants in your backyard
- Getting the CPA to segment their client base for best results

Building Your IRA Knowledge and Resources

- Software
- Building your library
- Additional planning tools
- Resources – Leverage America's IRA Experts™

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The Table Bay Purple Power Practice Building Program™
Sales is Your Lifeblood, Developing Exceptional Talent is Ours

- Anchor Your Future – The Table Bay Practice Building Program
- The 10-Step Plan for Building and Sustaining Your Practice
- On the morning of 9/11
- Eliminate the volatile sales cycle
- Doing things better, faster, simpler, and more profitably
- Improving effectiveness
- The power of systematization
- Kaizen
- Increasing your income 200-500%
- Building your retirement plan – The MAC Plan
- Advisory Council

Putting It All Together – How to Make it Happen – NOW!

- What is luck?
- The Four Foundation Steps
- The Four Revenue Generating Steps
- The Successful Habits Steps
- What is the first thing you do tomorrow?