**FOR IMMEDIATE RELEASE**

July 1st, 2020

**Local Financial Advisor Completes Advanced Virtual Training from**

**America’s IRA Experts at Ed Slott and Company, LLC**

*Amid the COVID-19 Crisis, Members of Ed Slott’s Master Elite IRA Advisor GroupSM Participate in Virtual Workshop on The Latest Retirement Account Planning Strategies, Estate Planning Techniques and Tax Laws*

Ozark, MO, July 1st, 2020 – Brad Pistole, a *Certified Financial Fiduciary®, a Certified Annuity Specialist®,* and the President and CEO of Trinity Insurance & Financial Services, INC in Ozark, MO completed his semiannual training with America’s IRA Experts at Ed Slott and Company, LLC by participating in a virtual workshop April 30 – May 1, 2020. The online workshop, which was attended by members of Ed Slott’s Master Elite IRA Advisor GroupSM, provided in-depth technical training on advanced retirement account planning strategies, estate planning techniques and new tax laws, as well as an in-depth look at the new retirement planning landscape since both the SECURE Act and CARES Act ushered in several significant tax and retirement planning laws since January 1.

“This is already shaping up to be a historical year, and we’re just in May.  In January, the SECURE Act single-handedly upended many long-standing retirement rules. Only three months later, the CARES Act brought another wave of temporary retirement law changes for 2020,” said Ed Slott, CPA, founder of Ed Slott and Company, AARP columnist and a nationally recognized IRA expert who was named “The Best Source for IRA Advice” by *The Wall Street Journal*. “As a member of our advanced training program for 10 years, I commend Brad Pistole for continuously prioritizing his retirement planning education throughout these rapid and drastic changes. He truly is an essential worker going above and beyond to deliver informed and accurate financial guidance to his clients. With this ongoing training, Brad can offer the latest insight on any necessary updates one may need for their financial plan during and after these uncertain economic times.”

Training highlights from this event included: A look at the CARES Act including the 2020 RMD waiver, coronavirus related distributions and changes to plan loans; SECURE Act provisions and changes effective for 2020; the elimination of the stretch IRA for most beneficiaries and the new 10-year payout rule for beneficiaries; the new SECURE Act rules for special needs trusts; 5 stretch IRA alternatives; new life expectancy tables for RMDs for 2021; 2020 tax planning including estate and gift exemption planning and a SECURE Act update for Qualified Charitable Distributions (QCDs) for 2020; disaster and recovery strategies for IRA trusts; an in-depth look at SECURE Act analysis and annuity-related changes to company savings plans; 10 things to know about the year of death RMD; common QDRO misconceptions and mistakes; creditor protection for IRAs invested in LLCs; and a look at advanced case studies and rulings.

Training was provided by Ed Slott and Company’s team of retirement experts, including Ed Slott, CPA; Sarah Brenner, JD; Andy Ives, CFP®, AIF®; and Ian Berger, JD. Ed Slott and Company and many of the advisors in Ed Slott’s Master Elite IRA Advisor GroupSM 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 income planning. This virtual workshop also provided approved continuing education (CE) credit through American College, CFP® Board, IRS and CPE for retirement savings and income planning, federal tax law topics and general financial education.

Members of Ed Slott’s Master Elite IRA Advisor GroupSM have year-round access to Ed Slott and Company’s team of retirement experts for consultation on advanced planning topics. The membership also includes step-by-step processes, such as the Complete IRA Care Solution™ 30-module planning guide. Members also have access to proprietary worksheets, pamphlets and presentations, including *2020 Retirement Plan Changes, COVID-19 Retirement Account Relief and Retirement Plan Payouts to Beneficiaries Under the SECURE Act* that they can use when working with clients.

“From the elimination of the stretch IRA to the 2020 RMD wavier and penalty-free early distributions, there are so many new rules and laws and many Americans are unsure how to navigate their retirement plans this year,” said Brad Pistole. “Through my membership with Ed Slott and Company, I am constantly studying the latest retirement laws and strategies. Even though most industry events have been canceled, it’s great to be a part of an organization that prioritizes my health and safety while continuing to provide me with the education needed to help my clients through these unprecedented times.”

“It is said that crisis does not build character—*it reveals it,”* said Slott. *“*Leading financial advisors, like the members of our Master Elite IRA Advisor GroupSM, are taking the reins during one of the most uncertain and difficult periods in American history. By staying up-to-speed on the latest retirement and tax laws under both the SECURE and CARES Acts, our members are able to proactively communicate, educate and guide their clients through this changing financial landscape.”

Brad Pistole can be contacted for more information on IRA and retirement-related questions. Please visit www.guaranteedsafemoney.com or call 417-581-9222.

**ABOUT ED SLOTT AND COMPANY, LLC:** *Ed Slott and Company, LLC is the nation’s leading provider of technical IRA education for financial advisors, CPAs and attorneys. Ed Slott’s Elite IRA Advisor GroupSM is comprised of more than 400 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 has hosted several public television specials, including “Retire Safe & Secure! with Ed Slott.” Visit irahelp.com for more information.*