

## NO DAY BUT TODAY AND ROTH AUTOPILOT

30 Nov 2009

***The Roth IRA conversion isn't happening until next month, but the opportunity to capitalize on the changes is already slipping away.***

The Roth IRA conversion isn't happening until next month, but the opportunity to capitalize on the changes is already slipping away. **Mike Slemmer**, principal of **Advisors Trusted Advisor**, says advisors need to get in front of clients on this issue now to stand out in a crowded market. How? Try writing articles for the local media of your target market, be open to being interviewed on the radio and generally create awareness around Roth changes. Review your client base and find opportunities to speak at clubs and meetings to share their knowledge of the change and its impact, advises Slemmer. Be sure to check out the upcoming *Taxing Issues* feature on the Roth conversion in our upcoming issue.

Speaking of the Roth conversion, tech vendors are also getting into the game, lending a helping hand to advisors who need to not only absorb the changes, but translate the information into actionable points for clients. **SunGard** has just enhanced the Roth IRA analysis capabilities of its *WealthStation* wealth management platform, in anticipation of the impending conversion option. The function helps wealth advisors calculate different tax scenarios and guide clients in deciding whether the conversion makes fiscal sense for their particular set of circumstances. Whoever said you couldn't automate investment acumen?

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