Advisors Trusted Advisor

Industry-leading Roth Conversion Business-Building and Analysis Tools Enhanced with Latest Release

MEDFIELD, Mass., March 19, 2010– Advisors Trusted Advisor (www.AdvisorsTrustedAdvisor.com), a division of the Collaborative, today announced new business building resources and enhancements to its Roth Conversion Optimizer. ATA's **Roth 2010 Conversion Package** – an online portal comprised of educational materials, marketing tools and Optimizer – is now used by nearly 100 advisors and wealth managers.

New features in the Optimizer include:

- *Additional details in reporting* – the report now includes the detail figures that drive the tool's bar-graph display. The report includes conversion transaction details, plus year-by-year projections for the first generation and legacy period.
- *Lump-sum distribution analysis* – This allows the option of a lump-sum distribution in the year following the year of the IRA owner's death or viewing results by passing on IRA assets to a second generation.
- *Modeling the 10% early withdrawal penalty* – this option factors in the 10% early withdrawal penalty when an individual's IRA assets are used to pay some or all of the conversion tax and the individual is under age 59-1/2. Users may override the penalty and thus compare the benefit of using outside assets to pay conversion taxes.
- *Increased flexibility in modeling cash flow scenarios* – when a date of birth is not entered in this field, the tool projects a lump sum distribution of all IRA assets in the year following the year of the IRA owner's death.

Evan Bedel, CFP, of Bedel Financial Consulting in Indianapolis had this to say: "Over the last few months, the **Roth Conversion Optimizer** has been very beneficial for our firm. The Optimizer has allowed us to analyze our clients' financial situation by customizing multiple Roth conversion scenarios in an efficient and accurate way to meet our clients' unique needs. I recommend this software to advisors and wealth managers who are looking for a comprehensive Roth conversion analysis with a combination of efficiency, accuracy and flexibility."

New marketing and educational tools have been added to the Advisor Portal as well. These include invitations and case studies for people in different age brackets, and audio discussions on a variety of Roth-related topics.

Ronald Harvey, president of investment advisory firm, HCH Companies, Inc. stated, "We have used the Roth conversion marketing and seminar material from ATA's **Roth 2010 Conversion Package** for several months now. We've hosted seminars for CPA and general prospect audiences and have had a great response, and plan on doing seminars every 30 days. We're also using their other material for mailings and Roth conversion awareness -- and are looking forward to putting the new material to work for us".

The Roth 2010 Conversion Package, available through the online Roth 2010 Advisor Portal, includes: pre-packaged workshops for current and potential clients; fully-scripted PowerPoint presentations;

business-building strategies and tactics; information on how financial advisors can position themselves as retirement experts; access to the Roth IRA Conversion Optimizer, and much more.

“There’s been a huge response by investors to the new Roth conversion rules, and clearly those advisors who are actively marketing their Roth expertise are winning new business while serving a real client need. We’re pleased to offer these enhancements to the marketing and educational resources, and we’ve made the best conversion analysis tool even better,” said Michael Slemmer, Principal, Advisors Trusted Advisor.

About Advisors Trusted Advisor
Dedicated exclusively to solving the unique challenges of the Advisor market, Advisors Trusted Advisor provides registered investment advisors and wealth managers a one-stop practice management source for organizing, managing, and growing an investment advisory business. Clients enjoy easy access to more than 20 years of research, experience and information covering critical areas of practice management and growth – organized to fit any situation and budget.

For more information, visit: www.AdvisorsTrustedAdvisor.com/Roth2010

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