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Roth 2010 Conversion Package Arms Financial Advisors with Business-Building Opportunities

MEDFIELD, Mass., August 26, 2009 – In May of 2006, President Bush signed a \$70 billion tax cut provision that changed the eligibility rules for Roth IRA conversions. Starting on January 1, 2010, taxpayers with a modified adjusted gross income of more than \$100,000 will be allowed to convert a traditional IRA to a Roth IRA. In response to this, Advisors Trusted Advisor (www.AdvisorsTrustedAdvisor.com), a division of the Collaborative, has partnered with industry experts to create the Roth 2010 Conversion Package – a comprehensive packet of educational materials, marketing tools and a sophisticated Roth Conversion Optimizer.

“The advent of these new tax laws presents a unique opportunity for people in the wealth management industry to demonstrate their expertise in what will be an intricate decision,” Michael Slemmer, Principal, Advisors Trusted Advisor says. “In our fifteen years of helping advisors market and grow their businesses, we’ve rarely seen such a great opportunity for them to incorporate educational seminars and workshops to build their current client roster. Clients win and so do financial advisors!”

[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.

Salvatore LaMendola, of Giarmarco, Mullins & Horton, a Troy, Michigan-based trusts and estate practices group, had this to say: “I’ve surveyed the market for a long time looking at the available Roth conversion tools. I didn’t think getting such sophisticated results via such a user-friendly interface would be possible. But the **Roth 2010 Conversion Package** does it, making Roth conversion analysis fun for me and my clients. And the business-building tools help me put the analysis to work for my firm.”

“Our goal is two-fold,” Slemmer explains. “We want to arm financial advisors, wealth managers and independent reps with all the information they need to help clients make the best conversion decision – while also helping them build their businesses. The Roth Conversion Optimizer is the most robust analytical system on the market. Most Roth conversion tools are very simple, forcing the user into an ‘all-or-nothing-at-all’ decision about conversion. In fact, there are *many* factors that must be considered, leading to a recommendation to convert anywhere from zero to 100 percent of traditional IRA assets.”

Financial advisors who take advantage of this unique package will have both the strategies and the tools *today* to help clients take advantage of these changes *tomorrow*. The advisors that recognize this opportunity now will be able to beat the competition when everyone eventually focuses on this later in 2009 and into 2010.

The Roth 2010 Conversion Package was developed and is supported by Advisors Trusted Advisor and Convergent Retirement Plan Solutions, LLC, along with Archimedes Systems, Inc., developer of The Roth IRA Conversion Optimizer.

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.

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###Media Only Contact:

Beverly Flaxington

The Collaborative

1-508-359-8216

Beverly@the-collaborative.com