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Local Financial Services Firm Completes Advanced Virtual Training from America's IRA Experts at Ed Slott and Company, LLC

As the Aftermath of the SECURE Act and CARES Act Continue to Raise Complex Questions for Retirement Savers, Members of Ed Slott's Master Elite IRA Advisor Group℠ Attend Semiannual Virtual Workshop on the Latest Retirement Account Planning Strategies, Estate Planning Techniques and Tax Laws

Glen Mills, Pennsylvania – May 10, 2021 – Daniel A. White, Owner of Daniel A. White & Associates, LLC completed his semiannual training with America's IRA Experts at Ed Slott and Company, LLC by participating in a virtual workshop April 29-30, 2021. The invite-only workshop was attended by members of Ed Slott's Master Elite IRA Advisor Group℠; it provided in-depth technical training on advanced retirement account planning strategies, estate planning techniques, as well as a critical study of the aftermath surrounding the SECURE and CARES Acts' retirement and tax law changes.

"The repercussions of a tumultuous 2020 met with the application of multiple, significant new tax laws is a recipe for confused and frustrated retirement savers. Our team has been flooded with thousands of questions from individuals trying to understand and apply all the new rules now in effect. Add this to the stress of living in our 'new normal' and potentially navigating critical rollover decisions when faced with an early retirement or lay-offs surrounding the pandemic — working with a trained, knowledgeable professional is more important than ever," said Ed Slott, CPA, founder of Ed Slott and Company, AARP columnist, Professor of Practice at The American College of Financial Services® and nationally recognized IRA Expert who was named "The Best Source for IRA Advice" by *The Wall Street Journal*. "As a Master Elite member of our advanced training program for two years, I commend White for continuously prioritizing his education throughout this ever-changing retirement planning landscape. He is going above and beyond to deliver informed and accurate financial guidance to his clients in a time when it's needed most. With this ongoing training, White can offer the latest insight on any necessary updates one may need now and into the future."

Training highlights from this event included: A review of the SECURE Act and CARES Act, including repayment of coronavirus-related distributions (CRDs) and the return of required minimum distributions (RMDs) after being waived in 2020; how to advise successor beneficiaries inheriting retirement accounts under the SECURE Act; determining compensation for IRA and Roth IRA contribution planning; an in-depth look at practical planning issues in naming a minor as an IRA beneficiary; recent IRA court cases and judgments; transferring Roth IRAs in a divorce; comparing employer plans, sorting out plan tax rules and planning strategies for solo(k) plans; and proactive planning steps for navigating critical IRA dates and deadlines throughout the remainder of 2021.

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

Members of Ed Slott's Master Elite IRA Advisor Group℠ have year-round access to Ed Slott and Company's team of retirement experts for consultation on advanced planning topics. The membership also includes workshops, webinars, tax-law updates, step-by-step processes, such as the Complete IRA Care Solution™ 30-module planning guide, and so much more. Members also have access to proprietary worksheets, pamphlets and presentations, including a 7-step checklist for IRA trust planning after the SECURE Act, gift planning presentation, and tips to disarm the new retirement savings time bomb as seen in Ed Slott's new bestselling book and public television special that they can use when working with clients.

"From temporary law changes, like repaying CRDs under the CARES Act, to navigating options and requirements for inherited retirement accounts after the elimination of the stretch IRA after the SECURE Act, there are urgent steps almost all retirement savers need to take to have their financial plans reviewed and updated," said White. "Add to this the many indirect consequences of the pandemic, from divorce to job changes and early retirements, it is a complex time to be making critical financial decisions. Through my membership with Ed Slott and Company, I am confident in my abilities to serve the best interests of my clients as news continues to break, always equipped with the latest retirement laws and strategies and back-office support team."

"The members of our Master Elite IRA Advisor Group℠ are taking the lead in helping their clients navigate one of the most uncertain and difficult periods in American history," said Slott. "The SECURE Act and CARES Act are far from the last changes we will see for the retirement planning landscape, but our members will continue to receive the latest alerts and training on changes to retirement and tax law and policies so they can proactively serve their clients."

White can be contacted for more information on IRA and retirement-related questions. Please visit www.DanWhiteandAssociates.com or call (610)358-8942.

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 Group℠ is comprised of nearly 450 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" and released his latest book, "The New Retirement Savings Time Bomb," in March 2021. Visit irahelp.com for more information.*

ABOUT Daniel A. White & Associates, LLC: *Daniel A. White and Associates, LLC was founded in 1987 specializing in retirement income and transitional planning. A highly regarded professional in the industry, Dan has been published both nationally and locally. Nationally, you can find him in Fox Business News, Forbes, CNN Money, U.S. News & World Report, Market Watch from Dow Jones, Wall Street Journal, Philadelphia Business Journal, The Delaware County Daily Times, and The Philadelphia Inquirer. Locally, Dan White is the host of On the Money Radio Show on WDEL Delaware's NewsRadio 1150AM/101.7FM. White is known as an expert financial contributor in Kennett Square Neighbors, Garnet Valley Living, West Chester Living, Chadds Ford Neighbors, and East Bradford Neighbors Magazines.*
For more information on Daniel A. White & Associates, please visit:
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