



## Ed Slott Conference Recap

May 24 2016

Gary Schwartz, President & CEO of Madison Planning Group, has been a member in good standing with *Ed Slott Elite IRA Advisor Group* since **2008**. The Ed Slott Elite Ira Advisor Group is an organization comprised of some of the best Financial Advisors, CPA's, Accountants and Tax Professionals in America. These professionals obtain membership in Ed Slott through extensive training, meetings and mandatory testing. The training and testing ensures the members keep current on all aspects of the most current laws regarding IRA's.

**First, let me provide some information about the Ed Slott Elite IRA Advisor Group.**

Ed Slott was named "The Best Source for IRA Advice" by the Wall Street Journal and called "America's IRA Expert" by *Mutual Funds Magazine*. He is a nationally recognized IRA-distribution expert, a professional speaker, and the creator of several public television specials, including the most recent, Ed Slott's Retirement Rescue!



Gary (Centered) with Ed Slott (to the left of Gary) and several colleagues in Atlanta

### **Extensive Training and Education**

The extensive training and education that Gary receives through Ed Slott carries over into every aspect of Gary's all-encompassing approach to financial planning. To maintain his "Good Standing" status with the Ed Slott Elite IRA Group, Gary is required to regularly attend Ed Slott Seminars and is then required to take and **pass** qualifying tests. The knowledge and information that Gary learns from his training through The Ed Slott Elite IRA Advisor Group serves as an invaluable asset to his clients at Madison Planning Group. Being a member in Good Standing with Ed Slott further exacerbates Gary unwavering commitment to his clients.

### **Wealth of Experienced Advisors at his Disposal**

In addition to staying current on the latest Federal rulings regarding IRA's, Gary networks with the best Advisors in America where they share their cumulative wealth of experience. The professionals at Ed Slott are also available to Elite Advisors to provide immediate help for IRA questions that prove to be extremely complicated.

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### ***Gary Schwartz is a Member of the Ed Slott Elite IRA Advisor Group... So, what does that mean to our clients?***

Let's sum up the benefits **for you** as a client of Gary Schwartz at Madison Planning Group.

1. Gary attends mandatory training on all of the current tax laws regarding IRA's and is tested to maintain his membership in "Good Standing"
2. Gary has obtained Membership in the Ed Slott Elite IRA Advisor Group- remember, a degree of excellence that only a handful of other Advisors have obtained.
3. Gary networks with an exclusive group of advisors where they share their knowledge and experience.
4. Gary has exclusive access to a wealth of information that is available through the knowledgeable and professional staff at Ed Slott Elite IRA Advisor Group to assist with complicated IRA questions.

*Ed Slott's Elite IRA Advisor Group is solely an indication that the financial advisor has attended training provided by Ed Slott and Company. Ed Slott is not affiliated with Royal Alliance Associates, Inc.*

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*Financial Planning and additional advisory services offered through Madison Advisory Services Inc.*

*Insurance offered through Madison Planning Group Inc. Royal Alliance is not affiliated with either entity*