



FOR IMMEDIATE RELEASE

November 8, 2016

Local CFP® at RMH Advisors, LLC Receives Advanced Training from America's IRA Experts at Ed Slott and Company, LLC

Semiannual Workshop Held for Members of Ed Slott's Master Elite IRA Advisor GroupSM to Train on Latest Retirement Account Planning Strategies, New Tax Laws and Guidelines for New DOL Fiduciary Rule

MURRIETA, CA – November 8, 2016 – Ross S. Hunt, Managing Director of RMH Advisors, LLC completed his semiannual training from America's IRA Experts with Ed Slott and Company, LLC in Coronado, California on October 27 through 29, 2016. The workshop, which was attended by members of Ed Slott's Master Elite IRA Advisor GroupSM, provided in-depth technical training on [advanced retirement account planning strategies](#), estate planning techniques and new tax laws. This timely insight comes as the eldest of baby boomers begin taking their government mandated distributions from their retirement accounts this year, known as required minimum distributions or RMDs.

“About 2.8 million Americans turn 70 in 2016 and will be the first wave of baby boomers that will lead the way in tackling a new retirement challenge – required minimum distributions. These mandatory distributions start once a taxpayer turns 70½, but many factors should be considered when timing your first withdrawal, including your income level, taxes and even your birthday,” said Ed Slott, CPA, founder of Ed Slott and Company and a nationally recognized IRA expert who was named “The Best Source for IRA Advice” by *The Wall Street Journal*. “RMDs can be difficult to navigate and if not executed properly, can result in penalties and a hefty tax bill. I commend Ross, who has been associated with our advanced training program for 7 years, for aspiring to have the latest training and education as it relates to retirement planning so that he can better serve his baby boomer clients as they transition into the distribution phase of retirement.”

Highlights from this event included: estate tax reduction strategies; advanced IRA trust planning, including when and when not to name a trust as an IRA beneficiary; charitable IRA rollovers; the latest updates on the Department of Labor's Fiduciary Rule; the new IRS 60-day rollover relief policy; retirement account beneficiaries, including how to name a minor as a beneficiary; tax planning for investment income; IRA creditor protection strategies; Roth recharacterization and IRA withdrawal strategies; as well as advanced case studies and rulings on community property and retirement plans, new and old fiduciary rules and their impact on IRA trusts, key planning issues when retirees reach 70½, common Simplified Employee Pension mistakes and how to fix them, and more.

Training was provided by Ed Slott and Company's team of retirement experts, including Ed Slott, CPA; Jeff Levine, CPA/PFS, CFP®; Beverly DeVeny and Sarah Brenner, JD and included a review of case studies and rulings that impact IRAs and retirement planning overall. Ed Slott and Company's team of retirement experts, along with many of the advisors in Ed Slott's Master Elite IRA Advisor

GroupSM, are often go-to resources for attorneys, CPAs and other financial advisors because of their in-depth knowledge and expertise in all areas of retirement account and income planning.

Members also receive year-round access to Ed Slott and Company's team of retirement experts for more advanced planning support, as well as step-by-step processes, including the Complete IRA Care SolutionsTM 35-module planning guide, worksheets and pamphlets, including *The Definitive Guide to Required Minimum Distributions for Baby Boomers*, and more to use when working with clients.

"Working with Ed Slott and Company's team of retirement experts has provided me with access to the most advanced, in-depth retirement training available. With this specialized training, I am confident in my ability to provide my baby boomer clients with accurate, up-to-date advice as they transition into the distribution part of retirement and begin taking their required minimum distributions," said Hunt.

"Most advisors have not received training on the latest tax and IRA distribution rules. With an abundance of misinformation out there, it's extremely important to [work with a well-informed advisor who receives on-going education](#)," said Slott. "Advisors associated with Ed Slott and Company receive the most up-to-date technical training in the industry, but should an unusual or difficult situation come their way, they also have immediate access to our team of retirement experts to help guide them through the most complicated planning issues."

Ross Hunt can be contacted for more information on IRA and retirement related questions. Please visit www.rmhadvisors.com or call (951) 696-5292.

ABOUT ROSS HUNT & RMH ADVISORS, LLC: Ross S. Hunt, CFP® has been providing sound financial advice and guidance to his clients for more than 30 years, committed to helping individuals and families meet and exceed their financial goals. Ross Hunt is Managing Partner and with his wife, Mary, are cofounders of RMH Advisors, LLC, a fee-only, Registered Investment Advisory firm located in Murrieta, CA. Ross has built his advisory business by combining a sound asset class investing methodology with holistic [financial planning](#) and first-class client service. It's no coincidence that more than half of Ross' clients have been with him for more than 20 years!

ABOUT ED SLOTT AND COMPANY, LLC: *Ed Slott and Company, LLC is the nation's leading provider of technical IRA training for financial advisors, CPAs and attorneys. Membership to Ed Slott's Elite IRA Advisor GroupSM is limited to the top financial professionals in the United States, with nearly 400 professionals dedicated to the ongoing training and mastery of advanced retirement account and tax planning laws and strategies. Mr. Slott is a nationally recognized IRA distribution expert, best-selling author, professional speaker, and host of several public television specials, including "Ed Slott's Retirement Road Map!" Visit <http://www.ira-help.com/> for more information.*

Ross Hunt is a registered principal with and securities offered through LPL Financial, member FINRA/SIPC. Financial Planning offered through RMH ADVISORS, LLC, a Registered Investment Advisor. Ed Slott's Elite IRA Advisor Group, RMH Advisors, LLC and LPL Financial are separate entities.

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