

NEWS

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FOR IMMEDIATE RELEASE

LOCAL ESTATE PLANNING ATTORNEY COMPLETES EXCLUSIVE IRA TRAINING PROGRAM TAUGHT BY NATIONALLY-KNOWN IRA EXPERT

[RICHMOND, VIRGINIA] – Estate Planning Attorney, Melanie M. Lee, completed extensive training on planning with IRAs and Qualified Retirement Plans (401k, 403b, 457, etc.) at an educational conference on January 27, 2007. This exclusive, lawyers-only training program was sponsored by the American Academy of Estate Planning Attorneys and only the second event where the instructor and nationally-known IRA expert, Ed Slott, taught his retirement planning techniques to estate planning attorneys. Slott is the author of the widely-acclaimed books, “The Retirement Savings Bomb...and How to Defuse It” and “Your Complete Retirement Planning Road Map: The Leave-Nothing-to-Chance, Worry-Free, All-Systems-Go Guide.” He has lectured extensively for years to financial professionals across the country on the complex IRA rules and how to properly plan to preserve and then transfer IRAs to family members.

Attorney Lee strongly felt it was critical that she complete this important training. “The IRA or other qualified retirement plan is often the largest single asset in the estate of many clients,” explains Lee. “The IRA rules, however, are confusing for even lawyers, financial advisors, and CPAs, let alone the average consumer.” In fact, Slott purposely developed this highly-technical program for members of the American Academy of Estate Planning Attorneys to fill what he sees as a lack of qualified lawyers to work with the financial advisors he has trained across the country and their clients. This highly-technical IRA training further equips Academy attorneys to help consumers navigate the waters of IRA planning.

“Because Slott’s planning techniques are designed to save clients large sums of money and to avoid costly mistakes which would otherwise result in huge tax payments, this type of education gives clients a higher level of confidence in the estate planning attorneys they work with, especially since these professionals are at the center of many retirement planning discussions with their clients,” explains Academy CEO Sanford Fisch. “Our attorney members were uniquely well-suited to learn Slott’s techniques because our Education Department has been providing them with regular IRA training for many years. Now, the national reach of our membership uniquely positions us to help make Slott’s techniques available to financial advisors and their clients in virtually every state.”

“It is important that professionals know how to advise clients so that they and their heirs can enjoy the tax benefits that IRAs and qualified retirement plans offer,” says Lee. “When properly

handled, with proper estate planning these benefits can extend over the life of the owner and the owner's heirs for generations. For this reason, I wanted to be trained by the country's most-noted expert in this field so I can better serve my clients."

Lee Law Office, LLC is devoted to estate planning and endeavors to help clients meet their long-term estate and financial goals. For more information about Melanie Lee, the firm, and/or the services they provide, please call (804) 204-1500, or visit their website at www.richmondassetprotection.com. Media inquiries on estate planning topics are also welcome.

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