

Calrima Financial
and Insurance Agency

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**LOCAL ADVISOR RICHARD LOEK ATTENDS EXCLUSIVE RETIREMENT
PLANNING WORKSHOP WITH AMERICA'S IRA EXPERT ED SLOTT**

San Jose, CA - November 15, 2012 – Richard Loek completed expert-level IRA distribution training at Ed Slott's recent Master Elite IRA Advisor GroupSM Workshop on November 15, 2012 in Phoenix, Ariz. Richard Loek spent several days with Ed Slott and Company, America's IRA Experts, drilling deep into the complicated issues of IRA distribution planning and studying most recent IRS rulings.

Covering recent updates such as the Health Care Law's tax consequences and year-end conversion planning, Richard Loek joined over 200 of the nation's top financial professionals who are dedicated to solving the country's biggest and most complex financial problem — effectively managing the distribution of assets from Individual Retirement Arrangements (IRAs). Attendees were educated on Roth conversion planning, estate planning and leveraging current tax law in an effort to ensure their clients' retirement accounts are set-up and maintained correctly.

“Some people think the crux of retirement saving is just building wealth and playing by the rules, but they face sudden shock when they see how much money they can lose to taxes,” says Ed Slott, a nationally recognized IRA-distribution expert who was named “The Best Source for IRA Advice” by *The Wall Street Journal*.

Slott continues, “An educated advisor can protect your money from high taxes, keep more of your money and secure your retirement. By joining the Elite group, Richard Loek has committed his/her time, money and effort into an educational membership group so he/she can have the knowledge to truly impact his/her clients' futures and families.”

ABOUT ED SLOTT & COMPANY, LLC: Ed Slott & Company, LLC is the nation's leading provider of IRA training for financial advisors. Mr. Slott is the author of several leading books on retirement distribution planning. He is a nationally recognized IRA-distribution expert, a professional speaker, and the creator of several public television specials, including Ed Slott's Retirement Rescue!

Ed Slott has been quoted in *The New York Times*, *Newsday*, *The Wall Street Journal*, *The Washington Post*, *Money Magazine*, and *Forbes*. He has appeared on NBC, ABC, CBS, CNBC, CNN, FOX, PBS, Public Television, NPR, and Bloomberg TV and radio.

ABOUT CALRIMA FINANCIAL & INSURANCE AGENCY (Calrima):

Calrima has a comprehensive team of associates and affiliates that pride themselves in providing outstanding customer service and achieving customer loyalty. Calrima provides employee health benefits, Estate Planning and comprehensive benefits review and analysis. (Investment Advisory Services offered through Global Financial Private Capital, LLC, an SEC Registered Investment Adviser and ERISA 3(38) plan fiduciary; Any comments regarding safe and secure investments,

and guaranteed income streams refer only to fixed insurance products. They do not refer, in any way to securities or investment advisory products. Insurance and Annuity product guarantees are subject to the claims-paying ability of the issuing company, and are not offered by Global Financial Private Capital; The information provided by Ed Slott and Company is provided by Ed Slott and Company, not Global Financial-Private Capital).

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