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LOCAL ADVISOR COMPLETES TRAINING ON NEW RETIREMENT AND TAX LAWS AT EXCLUSIVE CONFERENCE WITH AMERICA'S IRA EXPERTS

CAMPBELL, CA MAY 5, 2014 – "IRAs are taking center stage (making up over 25% of total retirement savings nationwide)," Ed Slott expressed from his semi-annual Elite IRA Advisor Group℠ training program.

Richard Loek completed several days of advanced training with America's IRA Experts on April 26, 2014 in Orlando, Florida, drilling deep into key areas that can impact tax planning and ensure his clients and families can keep more of their retirement savings.

Recent updates covered included the *Bobrow* Tax Court case — which changed the rules for 60-day IRA rollovers and affects everyone with an IRA— and tax planning for 2014, along with a course on Social Security from a leading expert in the area, Elaine Floyd, Director of Retirement and Life Planning for Horsesmouth.

This group of close to 400 of the nation's top financial professionals heard in-depth information on the new estate and gift tax exemptions, planning with Health Savings Accounts and IRAs, and the most recent IRS cases and rulings.

"There's a new premium on advisors who can help people protect their savings and navigate the complex web of tax rules without increasing Uncle Sam's share.

We train these advisors in the specialized field of IRA distribution planning so their clients can keep more of their retirement savings in the family," Slott continued. "To consumers I hear from, these advisors are true retirement super heroes."

IRAs total roughly $5.7 trillion in total retirement assets across the country. Richard Loek welcomes requests for more information about retirement distribution planning and is well versed in the subjects of the latest tax law updates and Congressional action and tax, IRA and retirement planning strategies.

ABOUT ED SLOTT and COMPANY, LLC: Ed Slott and Company, LLC is the nation's leading provider of IRA training for financial advisors. Mr. Slott is the author of multiple best-selling 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!

ABOUT Calrima Financial & Insurance Agency (2006) and Onesta Wealth Management, LLC, (2012) are independent Insruance and Investment adviser companies. Working together utilizing an exclusive five key element process to help convert client's possibilities into realities; in other words, Helping Families Thrive. Calrima and Onesta are located in Campbell at 1875 Winchester Blvd, #100, Campbell, CA 95008

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