



FOR IMMEDIATE RELEASE

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**Local Certified Financial Planner™ Practitioner
Completes Advanced Retirement Tax Training at National Semiannual Conference Hosted
by America's IRA Experts in Las Vegas**

Burr Ridge, IL – 05/05/2026 — Lori Barone, CFP®, President and Founder of Barone Financial Group has completed advanced IRA and retirement-tax training with Ed Slott and Company, LLC, by attending the firm's Spring 2026 workshop of Ed Slott's Elite IRA Advisor GroupSM, held April 23–24 in Las Vegas, Nevada.

Tax season may be over for many, but tax planning never stops. While most Americans focused on filing their 2025 returns, the financial professionals gathered at this workshop were studying the tax laws that will affect retirement savings for years to come. The goal is not to minimize this year's tax bill, but to minimize the lifetime tax burden on every dollar saved.

This invitation-only training brought together top financial professionals from across the country for two days of instruction on the layered requirements now facing retirement savers under three simultaneous major laws. The SECURE Act, SECURE 2.0 Act, and the newly enacted One Big Beautiful Bill Act (OBBBA) are now all in effect with overlapping rules that require careful coordination. Participants received live instruction from America's IRA Experts on how to help clients navigate these changes and protect more of their retirement savings.

"The OBBBA extended lower tax rates, and that opens a real planning window," said Ed Slott, CPA, founder of Ed Slott and Company, LLC. "Every year you do not use a lower tax bracket, that opportunity is gone forever. There are no credits for wasted brackets in future years. The advisors who trained with us this week know exactly how to take advantage of this window before it closes."

Key Takeaways for Retirees and Families

- **The SECURE Act, SECURE 2.0 Act, and OBBBA:** Three landmark laws are now simultaneously in effect with overlapping rules that require careful coordination to avoid costly mistakes.
- **Trump Accounts:** A new tax-advantaged savings vehicle takes effect in July 2026, and advisors received a full briefing on how these accounts work alongside existing IRAs and 401(k)s.

- **Roth Conversions:** Converting retirement savings to a Roth IRA is one of the most powerful ways to reduce lifetime taxes, but advisors identified fifty distinct planning considerations that determine whether, when, and how much to convert.
- **Final IRS RMD Regulations:** The IRS finalized nearly 300 pages of required minimum distribution rules, and advisors reviewed exactly what those rules require for account owners, spouses, and beneficiaries.
- **Inherited IRAs and the 10-Year Rule:** Beneficiaries who inherit an IRA face strict distribution deadlines most families do not know exist, with requirements that vary based on account type and beneficiary relationship.
- **Mandatory Roth Catch-Up Contributions:** Starting in 2026, high earners making catch-up contributions to a 401(k) must direct those dollars to Roth, and advisors reviewed which clients are affected and what action is required before year-end.
- **IRAs vs. 401(k) Plans:** These two account types follow entirely separate rules on contributions, rollovers, and distributions, and confusing them can trigger unexpected taxes and penalties.

Featured Guest Sessions Included:

- **Shannon L. Evans, J.D., LL.M. Taxation, Evans and Associates** presented on protecting aging parents' retirement accounts before a health or cognitive decline makes planning changes impossible, and how beneficiary mistakes made today create the largest tax bills for heirs.
- **Ty Bennett, Leadership Inc.** shared research-backed strategies on what separates elite financial professionals from average ones, including a live Ninja Warrior demonstration on focus and adaptability under pressure.

"What struck me most at this workshop was how much has changed at once," said Barone, a member of Ed Slott's Elite IRA Advisor GroupSM since early 2025. "We spent an entire session on Roth conversions alone and identified *fifty* distinct planning considerations, several of which shifted because of the new legislation. We also got a complete briefing on the new Trump Accounts taking effect in July. These are conversations every retirement saver should be having with their advisor right now."

The Las Vegas workshop also highlighted the firm's nationwide consumer-education initiative, *Ed Slott and Company's Ultimate Retirement Tax-Savings Roadmap* now live at irahelp.com/retirementroadmap. This program helps retirees understand how to generate tax-efficient income, time Roth conversions, and avoid beneficiary mistakes by working with a trained advisor.

Barone can be contacted for IRA and retirement-related questions. Visit <https://www.baronefinancialgroup.com/> or call 1-630-908-7733.

ABOUT ED SLOTT AND COMPANY, LLC:

Ed Slott and Company, LLC, America's IRA Experts, is the nation's leading authority on retirement tax and IRA education. Backed by a team of tax, legal, and retirement specialists, the firm trains financial professionals nationwide and provides retirement savers with clear, practical answers to their most important planning questions. Its flagship program, Ed Slott's Elite IRA

Advisor GroupSM, includes nearly 500 of the nation's top financial professionals. The company also publishes *Keep More Quarterly*, a consumer newsletter focused on retirement tax-saving strategies. Led by founder Ed Slott, CPA, with nationally recognized experts Sarah Brenner, JD; Andy Ives, CFP®, AIF®; and Ian Berger, JD, the team is frequently featured in major media including *The Wall Street Journal*, *CNBC*, *Forbes*, and *The New York Times*. Slott is the author of *The Retirement Savings Time Bomb Ticks Louder* and co-host of the popular podcast, *The Great Retirement Debate* available on all major streaming platforms. Visit irahelp.com for more information.

ABOUT BARONE FINANCIAL GROUP, INC: Barone Financial Group is a full-service financial firm committed to helping people pursue their financial goals. We offer a wide range of financial products and services to individuals and business owners. We will enable you to identify your goals as well as make informed, sound decisions in order to reach them.

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