NEWS

For Immediate Release

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LANGE FINANCIAL GROUP LLC

Financial Security.
For Life.

Bestselling Author CPA/Attorney James Lange Offers Pro Bono Workshop Series to Bar Associations and CPA Groups

Workshop series to help estate planning professionals protect client assets from the dangers of the SECURE Act

PITTSBURGH, PA. [November 30, 2020] – James Lange, CPA/Attorney and the President of Lange Financial Group, today announced that he is doing a series of pro bono, 2-4 hour workshops for Bar Associations, legal and/or CPA groups in the United States. Lange will highlight the little known math of Roth IRA conversions, the best estate plan for attorneys and CPAs, and how to respond appropriately to what he calls "the dreaded" the SECURE Act.

"The SECURE Act is an abomination," Lange said. "It basically allows the IRS to confiscate roughly one third of an individual's retirement plan within 10 years of their death, potentially costing estates hundreds of thousands of dollars or more. I am passionate about educating as many estate planning lawyers and CPAs as possible about how to avoid this in order to help their personal finances as well as help them represent their clients' interests in the most powerful way possible."

The inspiration for this series came as a result of Lange's 2-hour workshop for the Pennsylvania Hi Teresa,

Absolutely NO RUSH on this. This news release isn't scheduled to go out until Tuesday morning at 8am ET.

Would you please post this final published version on MSP Tuesday morning sometime?

I know I'm sending it early, but I wanted to get it to you before I forgot (what with all the Thanksgiving cooking I'll be doing tomorrow and all the Thanksgiving eating I'll be doing all weekend!)

Hope you have a good one.
Thanks , Grace
Institute of Certified Public Accountants (PICPA). This webinar was open to the over 20,000 members of PICPA and was a so well-received that it inspired Lange to begin offering a series of these workshops to any Bar Association, legal and/or CPA group that would like to participate. He is choosing to give these workshops pro bono in order to help the greatest number of people possible.

Click here for a link to a short video clip that reveals “the secret” regarding ROTH IRAs.

“These workshops are important. People work their entire lives to make sure that they can leave something behind for their families. They deserve to be able to do that. Giving these pro bono webinars to the professionals that will be advising them is my way of making sure everyone has the proven strategies they need to protect their assets over time,” Lange said.

These educational workshops are based on the principles of Lange’s seventh best-selling book, *The IRA and Retirement Plan Owner's Guide to Beating the New Death Tax: 6 Proven Strategies to Protect Your Family from the SECURE Act,* which ranked #1 in three different categories on Amazon. These workshops and webinars will show CPAs and estate planning attorneys exactly how to protect their clients’ IRAs from excessive taxation under the SECURE Act. The goal is to help clients leave behind hundreds of thousands of dollars more for clients’ heirs while at the same time, providing for charities through CRUTs, Roth conversions and other perfectly legal, powerful financial vehicles.

Based on the meeting planner’s feedback, these workshops could cover four charitable strategies. One strategy, Qualified Charitable Deductions (QCDs), is well known; however, the other three strategies are not, but are very powerful, including “who gets what” – an interesting spin on legacy planning, as written by Lange and published by Forbes.com.

Workshop participants and meeting planners may also request a complimentary copy of Lange’s latest best-selling book.

Any law firm, Bar Association or CPA group interested may sign up for one of these pro bono workshops. Email GraceVogelzang@ImpactCommunications.org to explore options and get more information.

ABOUT LANGE FINANCIAL GROUP

James Lange is the 100% owner of four companies that together provide a uniquely personalized master plan for each client’s financial situation. Lange Financial Group, an investment advisory firm through which Lange offers time-tested, evidence-based investment strategies, is headquartered in Pittsburgh, Pennsylvania. With 35 years of experience, Lange and his staff combine legal, tax, insurance, and investment expertise under one roof. That unique combination of services helps IRA and retirement plan owners develop a personalized masterplan for growing and protecting their wealth. Lange's forthcoming book is centered on helping professors and other academics navigate the complexities of retiring secure from universities and other learning centers. For more information, visit www.PayTaxesLater.com.

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