



S.E.C. Education Foundation
proudly presents:

“Investing in Real Estate with Your New ROTH IRA in 2010”
and
“Tax Strategies for Self-Employed Commercial R.E. Professionals”



“Investing in Real Estate with Your New Roth IRA”
Tom Anderson, CEO
PENSICO Trust

Tom Anderson, CEO, President & Founder of PENSICO Trust Company is a recognized national expert, speaker, and author on the topic of self-directed IRAs. He is frequently quoted in magazines such as Fortune, Forbes, Kiplinger's, and Bottom-line Financial.

PENSICO Trust is a national leader in providing self-directed IRA & individual 401(k) education and custodial services to investors interested in diversifying their tax-sheltered portfolios beyond the limited options of publicly-traded investment product. By now you are probably aware of the new rule permitting conversion from a traditional IRA to a Roth IRA, regardless of your income or tax-filing status. This ruling, effective January 1st, 2010, also allows you to spread the tax impact of the conversion over three years - skipping 2010 altogether and splitting the tax between the 2011 and 2012 tax years. This course will familiarize you with the tax and planning benefits associated with a Roth IRA.

Course Topics:

- New 2010 rules for rolling your IRA over to a ROTH IRA
- The Advantages of the New ROTH IRA
- How to set up a “Self Directed ROTH IRA” for Real Estate Investment

Hotel & Travel Information

Sheraton Austin Hotel
701 East 11th Street
Austin, TX 78701

The special room rate for meeting attendees is **\$145.00** single or double. Make your **hotel reservations via telephone (888) 627-8349** or visit [The Society Of Exchange Counselors National Marketing Session](#) to reserve your room online. The local number for the hotel is (512) 478-1111 and the fax number is (512) 478-3700. **Make your hotel reservations early; we have a limited number of rooms available. The cut off day for reservations is February 13, 2010.**

Visit www.sheratonaustinhotel.com to learn about the hotel, and visit www.austintexas.org to learn about the Austin area. If you need a rental car, call AVIS, (800) 331-1600 and give our AWD# D833386 for special rates.

Austin, Texas
Sunday • March 7 • 2010

9:00 a.m. to Noon:
“Investing in RE with your New Roth IRA”
1:00 to 4:00 p.m.

“Tax Strategies for Self-Employed Commercial RE Professionals”



“Tax Strategies for Self-Employed Commercial R.E. Professionals”

Thomas Rich

Thomas Rich, the Bradford Company, is an accomplished professional speaker who draws from a diverse professional background to relate the Tax Strategies Live course in an engaging and useful way. Clients from various professional groups and the insurance, financial, and real estate industries have all given Thomas high marks for his communication skills. As a corporate leader and business executive, Thomas has worked in the computer, petroleum, retail, wholesale distribution, and automotive industries. This professional experience adds a tremendous amount of real-world insight and practical applications to Thomas' Tax Strategies Live program.

Learn how to:

- Identify \$7,500 or more in Self-employed Tax Deductions
- Turn “Tax Dollars” Back into “Your Dollars”
- Maximize Your Deductions for:
Entertainment Strategies, Stimulus package deductions,
Home office deductions, Travel deductions, Audit proofing,
Expenses vs. IRS Method Mileage,
- Help your Accountant Help You!
- How to Find “\$100 a Minute” Using these Strategies

COST:

\$95.00 (Includes Course Materials & Continental Breakfast)

Education Only: Register online www.secounselors.com for or Sunday courses by clicking the Education Only menu tab to register. You may pay your via credit card online, or by mailing your check in advance

OR:

Meeting Attendees: Register online www.secounselors.com for both courses when you register for the marketing session.

SOCIETY OF EXCHANGE COUNSELORS

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