**FOR IMMEDIATE RELEASE**
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# Brendan Houlihan Financial Advisor Completes Advanced Virtual Training from America's IRA Experts at Ed Slott and Company, LLC

*Members of Ed Slott's Elite IRA Advisor Group℠ Attend Semiannual Virtual Workshop and Learn About Future Threats to Retirement Accounts*

Palos Heights, IL --Brendan F. Houlihan of BFH Wealth Management completed his semiannual training with America's IRA Experts at Ed Slott and Company, LLC by participating in a virtual workshop October 21-22, 2021. The invite-only workshop was attended by members of Ed Slott's Elite IRA Advisor Group℠; it provided in-depth technical training on advanced retirement account planning strategies, estate planning techniques and new tax laws, as well as a proactive look at the numerous ways Congress could potentially target Americans' retirement savings.

"Congress has shown its hand this year as they've discussed several potential options to increase revenue. From an all-out ban on backdoor Roth conversions to implementing required minimum distributions for mega-IRAs to ending Roth conversions for high-earners, Uncle Sam is brainstorming ways to get a hand on your hard-earned nest egg. While these ideas have not become laws yet, they highly likely could be in the future, so it is crucial that retirement savers are working with a trained, knowledgeable financial professional who is up to speed on the future threats your retirement could face," said Ed Slott, CPA, founder of Ed Slott and Company. "I commend Houlihan for continuously prioritizing his education throughout this ever-changing retirement planning landscape. He is going above and beyond to deliver informed and accurate financial guidance to his clients in a time when it is needed most. With this ongoing training, Houlihan can offer the latest insight on any necessary updates one may need now and into the future."

Training highlights from this event included: A preview of the proposed SECURE Act 2.0 and how it would impact retirement and tax planning; the 5 best 2021 year-end retirement tax planning ideas; Roth IRAs and the strategies behind Peter Theil's $5 billion Roth IRA; the benefits of qualified charitable distributions and how to make the most of them; post-death charitable planning with IRA and retirement plans; strategies for leavings IRAs to charities including charitable remainder trusts; a look at early distributions and 10 percent penalty exceptions; the history of estate taxes and a 2021 estate planning check-up; and more.

"We have seen a complete overhaul of the retirement planning landscape in recent years – from the Tax Cuts and Jobs Act to the SECURE and CARES Acts —Congress is constantly changing the laws that surround retirement accounts," said Houlihan. "Through my membership with Ed Slott and Company, I am not only trained on the latest retirement and tax planning strategies, but I also have access to up-to-the-minute updates on all proposals, laws and policies impacting retirement accounts. It's a challenging time to be navigating this ever-changing financial landscape but I am confident in my abilities to serve in the best interest of my clients as news continues to break, always equipped with the latest information and back-office support team."

"With Congress constantly pulling the rug out from underneath America's retirement savers, financial professionals need to go beyond understanding planning strategies that are effective right now and be able to look ahead to the potential threats that could impact their clients' nest eggs in the future," said Slott. "It's crucial that Americans are working with an advisor that is not only privy to the latest retirement planning laws and strategies but also has the foresight to help protect you from greedy Uncle Sam. The members of our organization are well-trained, qualified professionals that prioritize both their ongoing education as well as your individual needs."

Contact Brendan Houlihan for more information on IRA and retirement-related questions. Please visit bfhwealthmanagement.com or call 708-280-8753.

**ABOUT ED SLOTT AND COMPANY, LLC:** *Ed Slott and Company, LLC is the nation's leading provider of technical IRA education for financial advisors, CPAs and attorneys. Ed Slott's Elite IRA Advisor Group*[SM] *is comprised of more than 475 of the nation's top financial professionals who are dedicated to the mastery of advanced retirement account and tax planning laws and strategies.*

**ABOUT BRENDAN HOULIHAN**, *a fiduciary, is Financial Advisor at* **BFH WEALTH MANAGEMENT** *and Learn to Earn Investment program for children. For more information on Brendan Houlihan's business, you can visit his website at* bfhwealthmanagement.com, *call him at (708)280-8753, or contact him by email at* brendan@BFHWealthManagement.com