Newkirk's

ROTH CONVERSION MATERIALS

Fact Sheet

Are you prepared to answer questions about the new 2010 Roth IRA conversion rules? You can be. With Newkirk's Roth conversion materials, you'll be able to easily relay the provisions and impact of converting traditional IRAs to Roth IRAs in 2010 and beyond. Choose from a variety of formats to address clients' questions.

Newkirk Roth conversion materials include:

- Printed booklet and HTML version
- PowerPoint® presentation
- Interactive online analyzer
- eSeminar

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Communication Innovation

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Roth Conversions: A Closer Look

Printed booklet and HTML version provide a closer look at the IRA conversion rules by:

- Explaining that the income and filing status restrictions on converting a traditional IRA to a Roth IRA will no longer apply, starting in 2010.
- Comparing the tax treatment of traditional and Roth IRAs.
- Explaining the process involved and the tax consequences of converting a traditional IRA to a Roth IRA.
- Highlighting the one-time opportunity to spread conversion income over two years.
- Discussing various factors to consider in making a conversion decision.
- Pointing out that the income limit on transfers from employer plans to Roth IRAs will no longer apply, beginning in 2010.

Booklets can be used as handouts or in mailings.
HTML Internet version can be e-mailed and/or posted on your website.

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Your promotional imprint here and/or back cover.

PowerPoint® Presentation

With this Microsoft® PowerPoint® on CD-ROM, you'll be able to complete your Roth IRA conversion services. Designed to coordinate with the printed and HTML materials, you'll be able to conduct in-person seminars or use as a visual guide in a client meeting. Delivered ready to use, you have the option to tailor the presentation each time you use it.

Features:

- Full-color graphics
- Presenter's script
- Customizable slides

Roth Conversion Analyzer

Developed by our subsidiary MasteryPOINT Financial Technologies, the Roth Conversion Analyzer is an interactive, easy-to-use online educational tool that allows IRA holders to:

- Learn about Roth IRA conversions.
- Understand the tax advantages of Roth IRAs.
- Compare the tax consequences of Roth versus traditional contributions, given the IRA holders' current and anticipated tax situations.
- Perform analyses to determine whether a Roth IRA conversion is right, given the owner's savings and tax situation.

The Roth Conversion Analyzer is accessed through your participant website and can be installed on your own server or hosted by Newkirk.

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New Roth Conversion and Portability eSeminar

Join our retirement experts from our subsidiary McKay Hochman for an in-depth explanation of Roth IRA conversions.

The online seminar will cover:

- New 2010 conversion to a Roth IRA rules, contrasted to prior rules.
- Two-year tax treatment of conversions made in 2010.
- Utilizing the conversion rules to make ongoing rollover contributions to a Roth IRA without an AGI limit.
- Portability to a Roth IRA.
- Form 1099R reporting for the transactions.

For eSeminar dates and times, visit **www.newkirk.com/event**

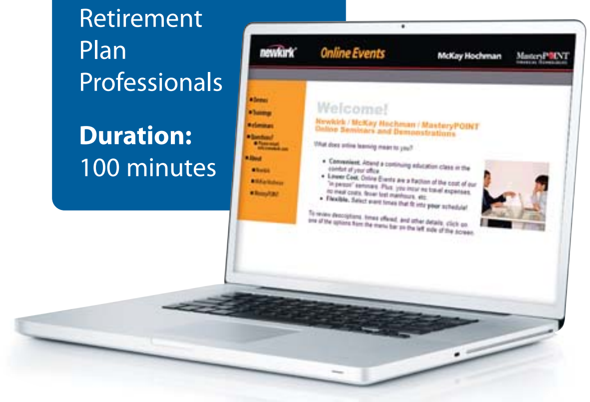
Course Level:
Basic to Intermediate

Prerequisite:
None

CPE Credit:
You may be eligible for 2 CPE credits

Who Should Attend:
Retirement Plan Professionals

Duration:
100 minutes



Questions?

To request information regarding Newkirk's Roth conversion materials, contact Newkirk at **800-525-4237** or **info@newkirk.com**.

Visit us online at **www.newkirk.com**.

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