Operation:

Territory Growth

Exclusively Offered to Variable Annuity and Mutual Fund Wholesalers

Expanding Relationships

Building Credibility

Increasing Sales

A Proven Package by James Lange, JD/CPA &

The Roth IRA Institute™

What Makes Operation: Territory Growth SO Successful in Growing VA & Mutual Fund Sales?

Roth IRA conversion strategies are undoubtedly the industry's hottest topic and the wirehouses, independents and bank channels are looking for the best Roth IRA conversion experts in the country to address their group of advisors. By offering to have an expert speak, you will get into almost any office, even offices that generally don't allow wholesalers. We have been welcomed into some of the top offices in New York and New Jersey - offices that usually ignore wholesalers.

What's the goal? The goal is to get you a full calendar of appointments with qualified reps who can sell your products. After hundreds of presentations, I have perfected a system which delivers cutting-edge information on IRAs and Roth conversions while helping you secure appointments with tough-to-see advisors… we call it **Operation: Territory Growth**. The process is highly professional, effective and can't be easier for the busy wholesaler.

The process is simple - Call together your target audience be it bank partners, stock brokers, insurance advisors or even CPAs and attorneys. Hold the event close to their location, or better yet, if their facility provides, hold the event right in their office. The audience then receives a one hour or longer presentation of the best, peer-reviewed material covering Roth IRA conversions and estate planning. Following the presentation, you will witness that the advisors are primed and ready for more. As a gesture of good will, you offer attendees a complimentary copy of Jim's best-selling book, ***Retire Secure! …***in exchange for their business card. You then reach out to the advisor and set a time to personally deliver the book. The law of reciprocation demands that the advisor will see and spend time with you because you are delivering valuable information.

Later this fall, Jim's new book, ***The Roth Revolution,*** will be available. We think this will be the hottest Roth IRA conversion book available. After you have had one appointment with the advisor when you deliver ***Retire Secure!,*** you could follow-up again and offer to bring them a copy of ***The Roth Revolution.*** The key is for them to see you as an available resource who offers them current and relevant information. You will be in front of them at Jim's presentation, when you deliver ***Retire Secure!*** and then again, when you deliver Jim's new book. This continued exposure with top reps in a highly professional manner is guaranteed to give you a huge return on your investment.

Operation: Territory Growth has been a stunning success when implemented by the wholesaler. To top the list, one wholesaler was able to acquire 115 business cards from just one event! The combination of Jim's presentation and the offer for ***Retire Secure!*** has definitely proven to be successful. Regardless of an advisor's belief in Roth IRA conversions, they still want to learn more and are willing to have someone come in and educate them.

For more information on availability and multiple event fee discounts, feel free to contact **Nicole DeMartino at 1.800.387.1129 or nicole@paytaxeslater.com**. Nicole can share with you how others have used **Operation: Territory Growth** to entertain both advisors and top advisor clients and how they were able to obtain outstanding results for such a small investment.

OPERATION: TERRITORY GROWTH - $12,500

Operation: Territory Growth is a proven system that will strengthen your existing relationships and open doors to new ones...especially with hard-to-reach advisors. This is an all-inclusive package that offers a 100% money back guarantee. If 90% of your audience does not grade Jim as "Excellent" or "Good," we will refund the fee. **You have nothing to lose and everything to gain.**

ALL INCLUSIVE PACKAGE DETAILS:

- ⇒ **Jim Lange, JD/CPA for the DAY!** **Schedule up to four 2-hour events in one day**
  (Example - Breakfast & lunch meeting for advisors, individual meetings w/ top reps, "A" client event in evening)
- ⇒ **Copies of *Retire Secure!* or *The Roth Revolution*** **(when ready)**
  (Includes 150 Books, additional available for purchase)
- ⇒ **Booking Signing After Each Event**
- ⇒ **Pre-Marketing E-mail Promotion Prior to your Events**
- ⇒ **Travel Costs** **(All travel, meals & hotels are included)**

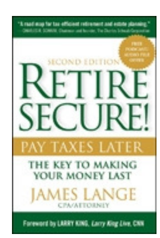
ABOUT JAMES LANGE, JD/CPA

Jim Lange, JD/CPA is a nationally recognized IRA, 401(k) and retirement plan distribution expert and founder and creator of The Roth IRA Institute™. The Roth IRA Institute™ teaches financial professionals and IRA and retirement plan owners how to get the most from their retirement plans using Roth IRA conversion strategies as an integral part of the planning process.

Jim is the best-selling author of two editions of ***Retire Secure! Pay Taxes Later***. Larry King wrote the foreword and Ed Slott wrote the introduction. ***Retire Secure!*** enjoys glowing testimonials from the industry's best: Charles Schwab, Roger Ibbotson, Jane Bryant Quinn and 60 other financial professionals. Jim's next book***, The Roth Revolution*** is due out this fall.

In addition to publishing ***Retire Secure!***, Jim's articles and recommendations have appeared 30 times in ***The Wall Street Journal***, 23 times in the ***Pittsburgh Post Gazette*** and in many peer-reviewed financial journals. His ground-breaking estate planning solution, "Lange's Cascading Beneficiary Plan" has been featured in ***Financial Planning*** magazine, ***The Tax Adviser (AICPA)***, ***Kiplinger's*** *and* ***The Wall Street Journal.***

When not teaching financial advisors, Jim is the President of four interrelated companies - a CPA firm, a law firm, a registered investment advisory firm and an insurance firm - that provide legal and financial services to IRA and retirement owners. All four companies are located in Pittsburgh where he has been practicing for the last 30 years.



Praise for Operation: Territory Growth

When I was with Transamerica, we hired Jim Lange to help accelerate our annuity business. Our target was wirehouses and we needed to get in front of their top producers. We used Jim's reputation as an outstanding Roth IRA conversion expert and a nationally-recognized speaker to catch their attention and win the advisor's business. The plan worked exceedingly well all over the country. Jim fully delivered and even offered us a technique to get over 100 appointments with producers with a one-day event. Jim gave a series of talks during the day and at their conclusion, the advisors thirsted for more. Our offering – give us a business card and we'll give you more of Jim… in the form of his best-selling book, ***Retire Secure!*** At the event, we collected the cards and then, shortly after the meeting, we called the advisors, set appointments and personally delivered Jim's book. Finally – a way to get in front of the top producers!

Mark Poulin, Senior Vice President, Annuity Sales Director –Merrill Lynch Division
Transamerica Capital Management

I wanted to thank you for your participation in our first Tax Talk University. The feedback we received was tremendous and we have signed up several of the attendees for both Gradient Tax and Gradient Insurance, so thank you for your assistance. I spoke with an advisor specifically that had been to multiple Ed Slott events, Natalie Choate, as well as others and he told me the information you delivered regarding IRAs and the overall presentation was far superior to anything he had encountered previously! Kudos to you! Thank you again for your participation and I look forward to working with you in the future.

Jeff Quick, Senior Vice President, Gradient Tax

We hired Jim Lange to make a series of presentations to different audiences regarding Roth IRA conversions. After brainstorming with Jim, we were thoroughly impressed by his willingness to do as many events in one day as we could organize. We arranged two talks with law firms, two talks with CPAs and a main client event for the evening. We received excellent reviews from all of our audiences. Since we had never heard Jim speak we didn't know what to expect, but after seeing Jim in action, we were reassured that we had made an outstanding choice. We fully expected Jim to be exceptional technically, which he was. What we didn't expect, however, was how well he would connect with our audiences. He made tough concepts easy to understand and showed warmth, patience and sincerity toward all of our clients. We provided great information straight from a nationally-regarded expert - a win-win for everybody.

Bradley H. Boffard, CLU, ChFC, Managing Partner, Financial Principles, LLC

Lock in Business with Operation: Territory Growth

Nicole DeMartino, CLTC
Marketing Director

For more information, contact
Nicole DeMartino, at 412.521.2732 / 800.387.1129

For More Information…

www.retiresecure.com