

PRESS RELEASE

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Bourette Named Member of Ed Slott's Elite IRA Advisor GroupSM

Jane Bourette, owner of Coast to Coast Financial Planning, LLC has been accepted as a member of Ed Slott's Elite IRA Advisor GroupSM, an exclusive membership group dedicated to the mastery of advanced retirement account and tax planning laws and strategies.

Coast to Coast Financial Planning LLC was founded in 2012 by Jane Bourette to address the growing needs for retirement income, long term care and estate financial planning.

Ed Slott and Company, LLC is the nation's leading provider of technical IRA education for financial advisors, CPAs and attorneys. His Elite IRA Advisor GroupSM 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.

"The timing is good," said Bourette. "The SECURE [Setting Every Community Up for Retirement Enhancement] Act was passed in 2020, changing the rules for most popular retirement plans and it was the first major retirement-related legislation enacted since the 2006 Pension Protection Act. There are many potential tax implications that clients need to be aware of for themselves and their beneficiaries and I am gaining knowledge with a direct line to the experts when needed. We are notified of changes to the tax code and updates on retirement planning, so clients can be sure their retirement dollars are safe from unnecessary taxes and fees.

Coast to Coast has offices in Chatham and on Nantucket, led by a team of professionals that includes investment advisors, estate attorneys, CPAs and more. Bourette and her team devise customized financial solutions to enable clients to reach their retirement income goals, address concerns about outliving their savings and plan for potential long-term care and estate planning needs.

For more information or to schedule a consultation, contact Coast to Coast Financial Planning at 508-945-7500 or visit www.CtoCFP.com. Visit irahelp.com for more information on Ed Slott and Company, LLC.



MEMBER OF
ED SLOTT'S
IRA
ADVISOR
GROUPSM