

BUXMONT CHAPTER

PA: PX-000501L , NJ: 20CE00159200, NY: 002280, IRS: E3S5R

In Person & Webinar: Roth IRA Conversions

Tuesday, December 15, 2026

Important—Please Read! This meeting is being offered both in-person and virtually as a webinar.

If you choose to attend virtually, you will need an email address to receive the link to access the webinar (please fill out email address below) and a device to view the webinar (PC, laptop, iPad, tablet). The link will be provided through email prior to the webinar.

The in-person meeting will be held at the Pinecrest Country Club, 101 Country Club Dr., Lansdale, PA 19446 (215) 855-4113.

CPE: 2 hours Federal Tax, 7:00—9 p.m.

Cocktail Hour 5:00 p.m. - 6:00 p.m., Dinner 6-7 p.m., CPE 7-9 p.m.

Registration Deadline: 12/11/2026

Speaker: Michael Menninger, CFP, President LPL Financial

NAME: _____ PTIN # _____

Street Address: _____ City/State/Zip _____

Email Address: _____ Phone: _____

☐ **I will attend in-person at the Pinecrest Country Club—Please indicate meal choice below**

PSTAP Member (\$60) ☐ Non-Member (\$80)

☐ Filet Mignon ☐ Bruschetta Grilled Salmon ☐ Vegetarian—Chef Selection

☐ **I will attend virtually via webinar:** ☐ PSTAP Member (\$60) ☐ Non-Member (\$80)

Mail form to: PSTAP, 150 Corporate Center Dr., Ste. 205, Camp Hill, PA 17011

Fax form to: 717-614-8663 Register Online at: www.pstapcpe.com

☐ Check made payable to Buxmont Chapter PSTAP is enclosed.

☐ VISA/Amex/MC/Disc Acct # _____ Exp: _____ CVV: _____

Signature: _____

No refunds will be granted after link to access webinar has been sent. Please check spam/junk folder. No show, no refunds—no exceptions. See full refund policy at pstap.org/event-policy. Business casual attire is appropriate. All topics subject to change.

Course Description: An introduction to the taxation of Roth IRA conversions and consideration of factors in the decision to convert.

Speaker Bio: Michael Menninger, CFP, President LPL Financial

Michael Menninger is an Investment Advisor Representative with LPL Financial who provides his clients with financial products and services, always with his client's individual needs foremost in his mind.

Michael helps his clients pursue their financial goals through a hardworking, common-sense and detail-oriented approach to financial planning. He provides personalized service, builds lasting relationships, and maintains a disciplined, long term outlook. He uses his experience and wide-ranging business and educational background as a basis for creating financial plans unique to each client's goals and aspirations. Mike focuses in various areas of financial planning including, but certainly not limited to: investment planning, retirement planning and estate planning strategies; all with an emphasis on providing tax-efficient strategies and solutions.

Mike attended both the United States Naval Academy and Long Island University where he studied engineering, chemistry, marine science, and mathematics. After graduating summa cum laude, Mike applied his talents to corporate financial planning and the management of environmental projects.

In 2000, Mike turned his focus toward financial planning for individuals and small businesses. In 2003, Mike made it his priority to earn the prestigious CERTIFIED FINANCIAL PLANNERTM certification from the American College in Bryn Mawr, Pennsylvania to further expand his knowledge in the field of financial planning. In January of 2007, Mike became an investment advisor representative with Voya, enabling him to provide financial products and services to his clients while maintaining the one-on-one relationships that he has developed and nurtured over the years. Mike is currently an Investment Advisor Representative with LPL Financial.

Since 2012, Mike has expanded his financial planning practice to include additional professionals. Subsequent to that, Mike established the new business entity called Menninger & Associates Financial Planning, which now includes a total of eight employees, and is continuing to grow.