Unlock expert guidance for your retirement plans: Over 160 years of combined experience

For nearly 50 years, our Tax-Advantaged Accounts Consulting Service has been the trusted resource for professionals navigating the complexities of retirement plans. With a subscription to our service, you'll get instant access to a team of seasoned consultants who can provide clear, actionable answers on a wide range of topics, including Individual Retirement Arrangements (IRAs), Simplified Employee Pension (SEP) plans, Savings Incentive Match Plan for Employees (SIMPLE) IRA plans, and Coverdell Education Savings Accounts (CESAs).

What do we do?

Whether it's a quick question or a more complex scenario, our experts are ready to guide you. Need clarity on recent changes, have a tax reporting question, or dealing with an issue that doesn't fit neatly into the rules? We've got you covered with real-world answers and solutions that work.

Stay ahead of the game with expert support at your fingertips.

Retirement plan regulations are becoming more complex every year. Don't let audits or challenging client scenarios catch you off guard. As the population ages, the need for precise, timely guidance is skyrocketing. With our service, you'll be ready for anything as you'll be just one phone call away from our team of experts. Be proactive, stay confident, and stay prepared with a dedicated consultant team by your side.

Act now.

Don't wait until you're in a bind. Contact your Account Representative today to learn more about how a subscription to our Tax-Advantaged Accounts Consulting Service can help you and your institution navigate the challenging and often complex landscape of tax-advantaged accounts.

Get to know our consultants

Steve LeRoux
Senior Specialized Consultant,
Tax-Advantaged Accounts

With over 40 years at Wolters Kluwer, Steve LeRoux has helped hundreds of financial organizations create, implement, and maintain their tax-advantaged accounts programs. LeRoux also has an extensive background in working with employer-qualified plans.

In his role, LeRoux helps design and ensure the technical accuracy of both standard and custom documents for establishment and transaction-related tax-advantaged accounts, as well as the IRA library, a technical resource manual used by several financial organizations. As an expert in his field, LeRoux has conducted over 400 IRA and Qualified Retirement Plan (QRP) seminars for financial organizations throughout the United States and has spoken at national and state conferences.

LeRoux is a Certified IRA Services Professional (CISP) and was a member of the Internal Revenue Service Information Reporting Program Advisory Committee (IRPAC). He earned his Bachelor of Science degree in Finance from St. Cloud State University in St. Cloud, Minnesota.

Robert Skomars
Senior Specialized Consultant,
Tax-Advantaged Accounts

With nearly 40 years of industry experience, Robert Skomars has helped hundreds of financial organizations create, implement, and maintain their tax-advantaged accounts programs.

In his current role, Skomars assists in developing IRA and Health Savings Account (HSA) training content and provides answers to IRA- and HSA-related technical questions asked by financial organizations that subscribe to the Wolters Kluwer Tax-Advantaged Accounts Consulting Service. Additionally, Skomars has conducted over 1,700 IRA, HSA, and QRP training events for financial organizations throughout the United States and is a frequent speaker at state banking association conferences.

Skomars is a Certified IRA Services Professional (CISP) and earned his Bachelor of Science degree in Business Management from St. Cloud State University in St. Cloud, Minnesota.

Michael Schiller
Manager, Specialized Consulting,
Tax-Advantaged Accounts

In his nearly 31 years with Wolters Kluwer, Michael Schiller has helped hundreds of financial organizations create, implement, and maintain their tax-advantaged accounts programs.

In his current role, Schiller manages the daily operational aspects of the Tax-Advantaged Accounts department. He is also responsible for managing the annual content update of the Wolters Kluwer IRA Library, a technical resource manual used by several financial organizations, and oversees the development of all IRA, HSA, CESA, SEP, and SIMPLE plan training programs and materials. Additionally, Schiller has conducted hundreds of IRA and HSA training events for financial organizations located throughout the United States.

Schiller is a Certified IRA Services Professional (CISP) and earned his Bachelor of Science degree in Social Studies from St. Cloud State University in St. Cloud, Minnesota.

Carlene Carter
Senior Specialized Consultant,
Tax-Advantaged Accounts

With over 30 years of financial services industry experience, Carlene Carter has helped hundreds of financial organizations create, implement, and maintain their tax-advantaged accounts programs.

In her current role, Carter assists in developing IRA and HSA training content and provides answers to IRA- and HSA-related technical questions asked by financial organizations that subscribe to the Wolters Kluwer Tax-Advantaged Accounts Consulting Service. As an expert in her field, Carter has conducted hundreds of IRA and HSA training events for financial organizations located throughout the United States. Additionally, she helps implement many industry-standard operational and transaction-based systems that financial organizations use to keep their IRA and HSA programs compliant.

Carter earned her Bachelor of Arts degree in Finance from the University of North Dakota in Grand Forks, North Dakota.

James Hrycyna
Senior Specialized Consultant,
Tax-Advantaged Accounts

With more than 21 years of financial services industry experience, James has worked closely with individuals to meet their financial goals as a Personal Banker, Small Business Banker, Financial Advisor, and Consultant. During his time as a Financial Advisor, he held Series 7 and 63 investment licenses. In his current role as a Sr. Specialized Consultant at Wolters Kluwer, James assists financial organizations to help them create, implement, and maintain their tax-advantaged accounts program.

About Wolters Kluwer Financial & Corporate Compliance

Wolters Kluwer (EURONEXT: WKL) is a global leader in information solutions, software and services for professionals in healthcare; tax and accounting; financial and corporate compliance; legal and regulatory; corporate performance and ESG. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services.

Wolters Kluwer reported 2024 annual revenues of €5.9 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 21,600 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands.

Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX, Euro Stoxx 50, and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the US (WTKWY).

For more information, visit **www.wolterskluwer.com.** Follow us on **LinkedIn, Facebook, Youtube,** and **Instagram.**