Ken Shotsberger

Vice President of Sales, Accuplan Benefits Services

Self-directed retirement education for investors, business owners, executives, and educators.



ABOUT KEN

Ken Shotsberger is Vice President of Sales at Accuplan Benefits Services, where he helps investors put retirement dollars into assets they understand: real estate, private loans, private companies, precious metals, and digital assets. Before Accuplan, he spent more than a decade as a financial advisor serving business owners, executives, and teachers in Chicago and Honolulu, including seven years in leadership at a large broker-dealer. American Estate & Trust custodies Accuplan's administered customer accounts.

Credentials: Vice President of Sales, Accuplan Benefits Services · Financial planning career since 2013 · Seven years in leadership at a large broker-dealer · Built advisor teams in Chicago and Honolulu · University of Kentucky

TOPICS HE SPEAKS ON

- Self-directed IRAs, Solo 401(k)
- Rollovers from 401(k), 403(b), and 457 plans
- Real estate and private loans in an IRA
- Roth IRAs and conversions
- Prohibited transactions
- Questions to ask before you self-direct

AUDIENCES

- Real estate investor associations
- Business owner groups
- Executive and professional networks
- Educator and public employee groups
- Private lender groups
- CPA and enrolled agent chapters

FORMATS

Keynote or breakout (20, 30, or 45 minutes), lunch-and-learn, panel, chapter education session, or podcast and livestream guest. Talks are educational; handouts are QR-only and point to one landing page.

BOOKING AND CONTACT

Call (702) 505-8212
Email ken@accuplan.net
Web accuplan.net/ken-shotsberger

Ken Shotsberger, Vice President of Sales, Accuplan Benefits Services · Available nationwide in person and remotely

Talks and host introduction

What your IRA can own beyond the stock market

20 OR 45 MINUTES · NEW TO SELF-DIRECTION

Most retirement accounts hold only stocks and funds because that is all the provider offers. Ken maps what the IRS allows inside a self-directed IRA, from rental property and private loans to private stock and digital assets, and how to fund one by transfer or rollover.

Audience fit: real estate investor associations, business owner groups, and general investor audiences.

Leaving a job? Your rollover options, in plain English

30 MINUTES · EXECUTIVES, EDUCATORS, OWNERS

A job change, retirement, or business sale often leaves money in a 401(k), 403(b), or 457 plan. Ken explains direct rollovers and 60-day rollovers, when a plan allows one, and how funds move into a self-directed IRA without creating a taxable distribution. Solo 401(k)'s are a common topic.

Audience fit: executive and professional networks, educator and public employee groups, and business owners.

Questions to ask before you self-direct

20 MINUTES · FROM A FORMER ADVISOR

Ken spent more than a decade as a financial advisor before joining Accuplan. He covers what every investor should settle first: fees, liquidity, who counts as a disqualified person, how prohibited transactions happen, and when to bring in a tax advisor.

Audience fit: CPA and enrolled agent chapters, private lender groups, and investors weighing a first deal.

30-SECOND HOST INTRODUCTION (FOR THE MC TO READ)

"Our next speaker spent more than a decade on the other side of the desk. Ken Shotsberger built a financial planning practice serving business owners, executives, and teachers in Chicago and Honolulu, including seven years in leadership at a large broker-dealer. Today he is Vice President of Sales at Accuplan Benefits Services. Please welcome Ken Shotsberger."

For podcast hosts

THE PITCH

Most of your listeners have a retirement account; few know it can own a rental property, fund a private loan, or hold Bitcoin. Ken Shotsberger spent more than a decade as a financial advisor before joining Accuplan, so he explains self-directed IRAs the way he would to a client: plainly, with the risks on the table. He is careful about the compliance lines between administration and custodianship, and nothing he says is tax, legal, or investment advice.

EIGHT SUGGESTED INTERVIEW QUESTIONS

1. What can a retirement account actually own, and why do most providers stop at stocks and funds?
2. You were a financial advisor for over a decade. Why don't more advisors talk about self-directed IRAs?
3. I'm leaving my job. What are my choices for the 401(k), and how does a rollover work?
4. Walk us through a private loan from an IRA. Who signs, and where does the interest go?
5. What is a prohibited transaction, and what is the most common way people stumble into one?
6. Who counts as a "disqualified person," and why does that list surprise people?
7. What should listeners know about Roth IRAs and conversions inside a self-directed account?
8. What should someone settle before making a first self-directed investment?

WHERE HE GOES DEEP

Rollovers after a job change

Moving money from a 401(k), 403(b), or 457 plan into a self-directed IRA, and the mistakes that create a tax bill.

Real estate and private loans

How investors buy property or make secured loans with retirement funds, and why the income has to flow back to the IRA.

The advisor's perspective

What a decade of working with business owners, executives, and teachers taught him about risk, liquidity, and fees.

RECORDING LOGISTICS

- Remote on your platform (Zoom, Riverside, SquadCast, or similar)
- Available weekdays; 30 to 60 minutes typical
- Headshot, bio, and talking points supplied in advance
- Happy to take listener questions submitted ahead of time

Room, AV, and program details

ROOM AND AV NEEDS

- Projector or screen with HDMI or USB-C input; Ken presents from his own laptop
- A presentation clicker, or a USB port on the house laptop if the room requires it
- The deck is 16:9; please confirm the screen aspect ratio
- Handouts are QR-only: a closing slide and a table card point to accuplan.net/ken-shotsberger
- Lapel or handheld microphone for rooms over 40 people, plus a lectern or small table and water
- Five minutes before the session to connect and test audio and video

TABLE-TOP SETUP

Ken brings	Host provides
Accuplan table cover and sign	6-foot table and two chairs
QR code stand (landing page)	A spot near the room entrance or coffee
Business cards	Power outlet within 10 feet, if possible
Tablet for questions and follow-up requests	15 minutes of setup before doors open, and the table left up through breaks

COMPLIANCE LINE FOR YOUR PROGRAM · PRINT AS WRITTEN

Educational session. Accuplan Benefits Services administers self-directed retirement accounts; American Estate & Trust is custodian. Not tax, legal, or investment advice.

SUGGESTED PROGRAM LISTING

Ken Shotsberger, Vice President of Sales, Accuplan Benefits Services. A former financial advisor with seven years in broker-dealer leadership, Ken helps investors use self-directed IRAs to hold real estate, private loans, and other assets they understand. Talk title and length as agreed with the host.

BOOKING AND CONTACT

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DISCLAIMER

Not financial advice: the information here is for educational and informational purposes only and does not constitute tax, legal, or investment advice. Accuplan Benefits Services is a third-party administrator, not a custodian; American Estate & Trust, a Nevada-chartered trust company, is custodian. Contribution limits and rules reflect IRS guidance as of the publication date and are subject to change. Consult a qualified tax advisor.