LBA 2016 APPRAISAL WEBINAR SERIES

2017 IRA Comprehensive Summertime Webinar Series
June 19, July 24, August 21 and September 11

All programs 3:30pm-5:00pm

Place a check next to each live webinar (WEB) and/or recording (REC) you would like to register for/order:
Registration fee (per webinar): $165 per connection/LBA members; $265 per connection/nonmember

June 19, 2017: IRA Comprehensive Summertime Series: Part One - The Products

This IRA webinar is designed for those new to IRAs or is a great review for those who have been in the business for a while. It addresses the purpose of IRAs, the role IRAs play in an account holder's retirement strategy and all the different types of IRAs and their eligibility requirements. This webinar will include information on contributions and distributions as well as death distributions. Attendees will leave with less apprehension about their responsibilities and compliance issues for opening IRAs at the financial institution. **Session Topics:** The ins and outs of all four IRA products: Traditional IRA, Roth IRA, Qualified Retirement Plan Rollovers, Simplified Employee Pension Plan; moving and changing IRAs; Coverdell Education Savings Accounts.

☐ **REC**

July 24, 2017: IRA Comprehensive Summertime Series: Part Two - Rollovers, Transfers, Conversions, Re-characterizations

This IRA webinar is designed for those who work with customers to move IRA funds. It is designed for new account specialists and IRA administrators to help your financial institution "get it right" when a customer is moving money to your institution. This detailed webinar will take each type of movement and walk you right through how it should be done. **Session Topics:** Rollover from IRA to IRA, Transfers from IRA to IRA, qualified retirement plan rollovers, IRA waiver of 60 day rule, re-characterizations, conversions, other special rollovers and revocations.

☐ **WEB** ☐ **REC**

August 21, 2017: IRA Comprehensive Summertime Series: Part Three - Distributions: Withholding, 70 ½, Death and Premature

In this IRA webinar, we will work on the distribution side of the IRA. You will learn how to do all kinds of distributions from the IRA, from premature to normal distributions. We will cover the reporting and the penalties your customer may face if this is done improperly. We will work some 70 ½ problems and make sure that your bank is ready to go for this year's distributions. **Session Topics:** Premature distributions, normal distributions, death distributions, reporting, and, penalties.

☐ **WEB** ☐ **REC**

September 11, 2017: IRA Comprehensive Summertime Series: Part Four - IRA Reporting and Paperwork

During this webinar we will break down the IRS reporting codes and transactions for all the 1099 and 5498 series for each one of these accounts. You will learn how the IRS wants you to report distributions and contributions, correct errors, and, report balances. This informative webinar is not for beginners to IRAs. It is designed for IRA Administrators and will help you teach the frontline what codes and paperwork to use. **Session Topics:** 5498 and 1098R codes for all four types of IRAs; handling rollovers and transfers reporting; coding recharacterizations, revocations and conversions; how to fix common errors; the reporting for the CESA and transaction codes; the reporting for the HAS; excess contributions corrections for all types of these accounts.

☐ **WEB** ☐ **REC**

Who Will Benefit

All IRA administrators, personal bankers, trust officers, customer service representatives, those selling or discussing these products with their customers, branch managers and other personnel who need distribution and compliance information.

Speaker

Deborah Crawford is the President of gettechnical, inc. a Baton Rouge-based firm, specializing in the education of banks and credit unions across the nation. Her 27+ years of banking and teaching experience began at Hibernia National Bank in New Orleans. She graduated from Louisiana State University with both her bachelor's and master's degrees. Deborah's specialty is in the deposit side of the financial institution where she teaches seminars on regulations, documentation, insurance and Individual Retirement Accounts.