Handling IRAs at Death of Customer (Webinar)

June 4, 2018 ☐ 3:30pm - 5:00pm

Due to increased level of questions on death distributions, we are offering for the first time a new webinar on setting up inherited IRAs and death distributions. The final regulations are out and the new law and life expectancy tables make this area one of change and new focus for IRA administrators. When your financial institution has a deceased customer and a beneficiary or multiple beneficiaries inherit, the bank is catapulted into the maze of system problems and beneficiary options. Questions arise from your customers. When do pay outs begin? How are the pay outs calculated? Can inherited IRAs be transferred? Who pays the taxes? This is not a workshop for beginners. It is a super training for IRA administrators and IRA support staff. You will receive the updated IRA Handbook.

What You Will Learn:

- Designated versus non-designated beneficiaries
- Determination date of beneficiaries
- Qualified versus non-qualified trusts as beneficiaries
- Treating the IRA as spouse's own
- Setting up an inherited IRA
- Reporting an inherited IRA
- Separate accounting for beneficiaries
- Disclaimers
- Transferring inherited IRAs
- Successor beneficiaries
- Timing of elections
- Calculations of the distribution
- Much, much more

Who Should Attend:

Only experienced IRA administrators and personnel should attend. This is a super advanced class.

Webinar 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.

Webinar Registration:

Mr./Mrs./Ms. ____

Bank____

Email Address____

Branch Street Address____

City, State, Zip____

Phone____

Fax____

Payment Options:

☐ Check (Made payable to Louisiana Bankers Association)

☐ Visa ☐ MasterCard ☐ American Express

Card Number____

Expiration Date ____________ Amount to be charged: __________

Name on Card (please print)____________________________

Signature ____

Billing Address: ____

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Please check:

Registration Fees for LBA Members

☐ Live Webinar Connection $165 per connection
☐ Webinar Recording $165 per recording

Registration Fees for Non-Members

☐ Live Webinar Connection $265 per connection
☐ Webinar Recording $265 per recording

☐ This training will be covered under SBET (Small Business Employee Training Program). Please provide an email address on the line below to receive the necessary documentation for reimbursement:

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***Please Note: Recordings are not eligible for SBET funding**

Submit Registration and view rosters in the Education Section of the LBA's website, www.lba.org

Webinar access codes will be sent to registrants with confirmation emails one week prior to session.