



IRA Advanced

February 7, 2018 ▪ 9:00am - 4:00pm
Home2 Suites by Hilton ▪ Lafayette, LA

The advanced IRA program concentrates on a review of products and all the advanced issues affecting IRAs. This seminar is not for beginners and includes all the rules for required minimum distributions and death distributions. It also includes audit, compliance and reporting procedures for IRAs.

Workshop Topics

- What's new with IRAs
- Product update and review of changes
- Premature distributions
- Exceptions to the 10% penalty
- Annuity distributions
- Tax levies on IRAs
- Transfers and rollovers after 70 1/2
- 70 1/2 calculations & issues
- Waivers
- Charitable contributions
- Death distributions
- Primary vs. contingent beneficiaries
- Treating the IRA as spouse's own
- Inheriting the IRA
- Successor beneficiaries, disclaimers, calculations
- Special topics
- Recharacterizations
- Conversions and reconversions
- Revocations
- Excesses
- Compliance, auditing and reporting

All participants should bring a standard, basic (non-financial) calculator.

Who Will Benefit

Intermediate and advanced level class for IRA administrators, trust officers, customer service representatives, personal bankers, branch managers and other personnel who need comprehensive distribution and compliance information.

Registration Fee

\$250, per LBA member

\$450, per non-member

Workshop Instructor



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.



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Registration Form

Registrant 1

Mr./Mrs./Ms. _____
Bank _____
Email Address _____
Branch Street Address _____
City, State, Zip _____
Phone _____
Fax _____

Registrant 2

Mr./Mrs./Ms. _____
Bank _____
Email Address _____
Branch Street Address _____
City, State, Zip _____
Phone _____
Fax _____

Payment Options

☐ Check (Made payable to the Louisiana Bankers Association)

☐ Visa ☐ MasterCard ☐ American Express

Card # _____ Expiration Date _____

Credit Card Billing address _____

Name on Card (Please Print) _____

Signature _____ Amount to be Charged on Card \$ _____

- ☐ I am unable to attend. Please send me _____ copies of the manual for :
☐ \$175 (member fee) ☐ \$375 (non-member fee)

(includes shipping and handling)

***Manuals will be shipped after the seminar.**

Registration Fee
\$250, per LBA member
\$450, per nonmember

☐ 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:

***Please Note: Manuals not eligible for SBET funding.**

Location

Home2 Suites by Hilton
1909 Kaliste Saloom Rd.
Lafayette, LA 70508
(337) 706-8610

Registration Fee

\$250, per LBA member
\$450, per non-member

Agenda

8:45 a.m.	Registration
9:00 a.m.	Program Begins
12:00 p.m.	Lunch
4:00 p.m.	Program Adjourns

All participants should bring a standard, basic (non-financial) calculator.

Cancellation Policy

*Due to facility commitments, cancellations must be received by **January 29, 2018**. Cancellations received after January 29, 2018 will be charged a \$125 cancellation fee. Any registrant who does not cancel will be billed the full registration fee and sent the manual. Substitutions are welcome at no additional charge.

Hotel Reservations

Home 2 Suites by Parc Lafayette is offering the below group rates for attendees of the 2/6 IRA Basics and 2/7 IRA Advanced programs. Please note there is not a designated reservation block set up for this event. Room reservations are based on hotel availability. Please call Renee Bergner at 337-408-2897 for your reservation and mention you are booking for the Louisiana Bankers Association seminar.

Studio King - \$109+tax/per night
2 Queen Bed Studio - \$119+tax/per night
1 Bedroom King Suite - \$139+tax/per night