



IRA Basics

February 6, 2018 ▪ 9:00am - 4:00pm
Home2 Suites by Hilton ▪ Lafayette, LA

The IRA Basics seminar is designed for those new to IRAs or 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 a customer's retirement strategy and all the different types of IRAs and their eligibility requirements. This great seminar includes some information on distributions and death distributions. Seminar attendees will leave with less apprehension about their responsibilities and compliance issues for opening IRAs at the financial institution.

Workshop Topics

- What's new with IRAs
- Overview of IRAs
- Traditional IRA
- Roth IRA
- Qualified Retirement Plan Rollovers
- Simplified Employee Pension Plan
- Moving and changing IRAs
- Coverdell Education Savings Accounts
- Basics on premature distributions
- Basics on 70 1/2 distributions



Who Will Benefit

All IRA administrators, personal bankers, trust officers, customer service representatives, and those selling or discussing these products with their customers.

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.**

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.**

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

Location

Home2 Suites by Hilton
 1909 Kaliste Saloon 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

Cancellation Policy

*Due to facility commitments, cancellations must be received by **January 30, 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 a 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