



# IRA, HSA and CESA Compliance, Reporting and Recordkeeping (Webinar)

## November 26, 2018 ☐ 3:30pm - 5:00pm

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, 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. We will also cover all compliance and documentation requirements for these custodial accounts. We will also go over the compliance schedule for all reporting and compliance issues.

### Program Topics:

- 5498 and 1098R codes for all four types of IRAs
- Handling rollovers and transfer reporting
- Coding recharacterizations, revocations and conversions
- How to fix common errors
- The reporting for the CESA and transaction codes
- The reporting for the HSA
- Excess contributions corrections for all types of these accounts
- Documents, forms and common errors

### Who Should Attend:

This webinar is designed for intermediate and advanced level IRA administrators, trust officers, customer service representatives, personal bankers, branch managers and other personnel who need distribution and compliance information.

### 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: \_\_\_\_\_  
 \_\_\_\_\_

### **Please check:**

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| <input type="checkbox"/> Live Webinar Connection | \$165 per connection |
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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](http://www.lba.org)

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