



# IRA Product Review: Traditional, Roth, SEP and SIMPLE (Webinar)

June 25, 2018 ☐ 3:30pm - 5:00pm

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, distributions and death distributions. Attendees will leave with less apprehension about their responsibilities and compliance issues for opening IRAs at the financial institution.

## What You Will Learn:

- 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

## Who Should Attend:

This webinar will benefit all IRA administrators, personal bankers, trust offers, customer service representatives and those selling or discussing these products with their customers.



## 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 \_\_\_\_\_  
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## **Please check:**

### **Registration Fees for LBA Members**

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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.**