



IRAs: The Rules Everyone Needs to Know (Webinar)

September 24, 2018 ☐ 3:30pm - 5:00pm

This webinar is designed to help develop a basic understanding of the four IRA products for everyone that is a sales representative, new accounts, loan officer, and branch manager at your financial institution. We don't all need the deep details but we do need to know who would buy each type of product and how they would benefit from each of the four IRA types: Traditional, Roth, SEP and SIMPLE. This webinar will provide basic training for your IRA staff.

Program Topics:

- Four IRA products to sell
- Moving funds from other institutions
- Moving funds from company retirement accounts
- Walking knowledge of distributions
- Enough about reporting to understand transaction codes
- IRA 101 for every employee

Who Should Attend:

This webinar will benefit tellers, new account representatives, IRA staff, business bankers, personal bankers, branch managers, training and all front line personnel.

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:

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:

***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.