



Auditing Your IRAs (Webinar)

July 22, 2019 ☐ 3:30pm-5:00 pm

IRAs are easy to audit because they have defined paperwork for documentation and all require reporting to the IRS. If you have repetitive, or what auditors like to call systemic errors, count it a good thing because either the system or your CSRs' training needs to be corrected, and the errors will go away. If the errors are random, then you probably have greater liability, and it is harder to correct on-going problems. Some things can be corrected, and some things cannot. For example, rollovers that are incorrect may create liability for your financial institution, and withholding that is not signed is not something you can go back and fix.

What You Will Learn

- How to check your IRS Reporting
- Bank's responsibility to IRS and to the customer
- How to check your internal documentation
- Who should have received amendments
- Learn the "ins" and "outs" and what to report in each box which will help you catch errors
- How to correct errors
- How to keep paperwork up-to-date

Who Should Attend

New Accounts Representatives, Branch Managers, Branch Administration, IRA Administrators, Personal Bankers, Training and Audit

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.



Auditing Your IRAs (Webinar)

July 22, 2019 ☐ 3:30pm-5:00 pm

Registration Form

Please make copies of this form if more connections are needed.

Connection 1

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

Connection 2

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 _____

Name on Card (please print) _____ Signature _____

Billing Address: _____ Amount to be charged on card \$ _____

Registration Fee

\$165 per connection, LBA members
 \$265 per connection, nonmembers

☐ I cannot participate in the live program.

Please send me the recording.

☐ \$165 (LBA members)

☐ \$265 (non-members)

*Recording and materials will be emailed
 after the program

☐ 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**

Registration Fee

\$165 per connection, LBA members
 \$265 per connection, nonmembers

Submit registration and view rosters in the

Education Section of LBA's Website, www.lba.org.

Agenda

3:30 p.m. Webinar Begins

5:00 p.m. Webinar Adjourns

Louisiana Bankers Association

5555 Bankers Avenue

Baton Rouge, LA 70808

225-387-3282

Fax 225-343-3159

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