LBA PROFESSIONAL DEVELOPMENT WEBINAR

IRAs: The Basics (Webinar)

October 7, 2019 □ 3:30pm– 5:00pm

IRA tax deadline is fast approaching and your customer needs to get his IRA contribution in. What do you do when someone walks in at 5PM on April 15th to make that contribution to his/her IRA? What if they don't have an IRA and you need to open one for them? These and other questions will be answered in this webinar. If you have just started with IRAs or want a good review of IRA fundamentals, this is the program for you. This program will prepare you to open, move and close IRAs and get all the paperwork right in the process. If you have been afraid of IRAs or just don't have enough basic knowledge, this webinar will get you excited and motivated to become the IRA expert at your organization.

What you will learn:

- Traditional IRA Eligibility and Deductibility Requirements
- Roth IRA Eligibility and Qualified Distributions Rules
- SEPs and SIMPLES
- How to move IRA money: Rollovers and Transfers
- How to move money from company retirement plans
- What happens if there is too much money put in an IRA
- What happens when the customer takes money out at 59 ½, 70 ½ and at death
- Do IRAs have penalties; who collects the penalty
- How does the IRS know the money is going in and out of an IRA
- What paperwork needs to be completed to open and close an IRA

Who Should Attend

New Accounts Representatives, Branch Managers, Branch Administration, IRA Administrators, Personal Bankers, Training and all frontline 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.

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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:

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***Please Note: Recordings are not eligible for SBET funding**

Registration Fee
$165 per connection, LBA members
$265 per connection, nonmembers

Agenda
3:30 p.m. Webinar Begins
5:00 p.m. Webinar Adjourns

Submit registration and view rosters in the Education Section of LBA's Website, www.lba.org.

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.