



IRA Rollovers and Transfers (Webinar)

April 8, 2019 ☐ 3:30pm - 5:00pm

This IRA webinar is designed for those who work with customers to move IRA funds. It is designed for new account specialists and IRA administrators to help your financial institution “get it right” when a customer is moving money to your institution. This detailed webinar will take each type of movement and walk you right through how it should be done.

Program Topics:

- Rollover from IRA to IRA
- Transfers from IRA to IRA
- Qualified retirement plan rollovers
- IRA waiver or 60 day rule
- Recharacterizations
- Conversions
- Other special rollovers and revocations
- Self Certifications and new codes

Who Should Attend:

This webinar is designed for all IRA administrators, personal bankers, trust officers, 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 _____
 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.