IRA Update and Review (Webinar)

January 14, 2019 ☐ 3:30pm - 5:00pm

This is a fast-paced IRA update and review for those who have been in the business a long time and want to know what is new and review those tricky issues with IRAs. The focus is a good refresher and providing any tax law changes and reporting issues. If you can only attend one program this year then this should be your choice.

Program Topics:

- Tax law and reporting changes if there are any
- Product review
- Trends in IRAs
- Rollovers and transfers
- Distributions on 70 ½, inherited and normal
- Reporting and compliance issues

Who Should Attend:

IRA Administrators, Deposit Operations, Compliance and Training Department

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.