# IRA Basics: Updated for the SECURE Act (Webinar)

## February 10, 2020 ☐ 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.

This program covers all of the new information from the SECURE Act which was passed on December 20, 2019.

## Program Topics:

- 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, 72 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.

**Webinar Registration:**

Mr./Mrs./Ms. _____

Bank_____

Email Address_____

Branch Street Address_____

City, State, Zip_____

Office Phone_____

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**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 _____

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**Please check:**

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