IRA Update and Review:
Includes SECURE Act Law Change (Webinar)
January 16, 2020 ▭ 10:00am - 11:30am

On December 20, 2019 the President signed the Setting Every Community Up for Retirement Enhancement Act (SECURE Act), it has many changes to retirement plans and this update will cover the Individual Retirement Changes! The age of 70 ½ has now been changed to 72 for distributions for Traditional IRAs. It also eliminated the contributions. The inherited IRA has been changed from the "stretch" of a beneficiary's life expectancy to 10 years.

Program Topics:

- Certain taxable non-tuition fellowship and stipend payments treated as compensation for IRA purposes
- Repeal of maximum age for traditional IRA contributions
- Penalty-free withdrawals from retirement plans for individuals in case of birth of child or adoption
- Increase in age for required beginning date for mandatory distributions to 72
- Changed the Qualified Charitable Distribution to 72
- Modification of required distribution rules for designated beneficiaries
- Increase in penalty for failure to file
- And IRS proposed new life expectancy tables

You will receive a 500+ Page IRA manual updated for these changes and others for the 2020 tax year.

Who Should Attend:

IRA Administrators, Branch Administration, Deposit Operations, Accounting Services, Compliance, Training, Customer Service Representatives, Personal Bankers and Branch Managers

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. ____

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Payment Options:

☐ Check (Made payable to Louisiana Bankers Association)

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Card Number____

Expiration Date ____________ Amount to be charged: __________

Name on Card (please print)______________________________

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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.