LBA PROFESSIONAL DEVELOPMENT WORKSHOPS

IRA Basics

Live/In-Person, Live Stream and Virtual Recording Options Available

October 20, 2021 ▪ 9:00am - 4:00pm

The IRA Basics seminar is designed for those new to IRAs or a great review for those who have been in the business a while. It addresses the purpose of IRAs, the role IRAs play in a customer's retirement strategy and all types of IRAs and their eligibility requirements. This great seminar includes information on a few distributions, including death distributions. Seminar attendees will leave with less apprehension about their responsibilities and compliance issues for opening IRAs at the financial institution.

Topics include:

- What's new with IRAs
- Overview of IRAs
- Traditional IRAs
- Roth IRAs
- Qualified Retirement Plan Rollover
- Simplified Employee Pension Plan
- SIMPLES
- Moving and changing IRAs
- Coverdell Education Savings Accounts
- Basics on premature distributions
- Basics on required minimum distributions

Who Will Benefit

This program is designed for all IRA Administrators, personal bankers, trust officers, customer service representatives and those selling or discussing these products with their customers.

Registration Fee

Member Fee for Live/In-person OR Live Stream OR Virtual Recording: $265
Non-Member Fee for Live/In-person OR Live Stream OR Virtual Recording: $465

Workshop Instructor

Deborah Crawford is the President of gettechnical, inc. a Virginia-based firm, specializing in the education of banks across the nation. Her 30+ 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

Registrant 1

Mr./Mrs./Ms. _____

Bank _____

Email Address _____

Branch Street Address _____

City, State, Zip _____

Phone _____

Cell _____

Please check:

☐ I will participate in-person at the LBA
☐ I will participate by Live Stream
☐ I would like to receive the Virtual Recording

Registrant 2

Mr./Mrs./Ms. _____

Bank _____

Email Address _____

Branch Street Address _____

City, State, Zip _____

Phone _____

Cell _____

Please check:

☐ I will participate in-person at the LBA
☐ I will participate by Live Stream
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Please note: If you participate in the in person or live virtual seminar, we will email a certificate to you following the program. Certificates will only be provided to registered attendees. If you opt for the recording, we will not be able to provide a certificate because we will not be able to track attendance.

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Payment Options

□ Check (Made payable to the Louisiana Bankers Association)
□ Visa □ MasterCard □ American Express
Card # _____ Expiration Date _____
Credit Card Billing address _____
Name on Card (Please Print) _____
Signature _____ Amount to be Charged on Card $_____

□ 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 not eligible for SBET funding.**

Location

The Bankers Center
5555 Bankers Avenue
Baton Rouge, LA 70808

Agenda

8:45 a.m.	Registration
9:00 a.m.	Program Begins
12:00 p.m.	Lunch Break
4:00 p.m.	Program Adjourns

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

Cancellation Policy

Due to commitments we must make to secure a class, we need your help. If you must cancel your registration, please do so at least 3 business days prior to the seminar date to avoid a $125 cancellation fee. Any registrant who does not cancel will be billed the full registration fee and sent the manual. Substitutions are welcome at no additional charge.

Hotel Information

Residence Inn by Marriott - Towne Center at Cedar Lodge 7061 Commerce Circle, Baton Rouge, LA 70809. For reservations, call **(225) 925-9100** and ask for the " Louisiana Bankers Association special room rate of **$127**."