



IRA Fundamentals Every Banker Should Know (Webinar)

January 14, 2021 10:00am - 11:30am

Does everyone on your staff know the fundamentals of IRAs? If not, this program is for you!

As one of the base products of financial institutions, there are basics that every banker should know. We will cover the products, the movements, the distributions and basic reporting to the IRS. You will learn talking points, how to stay out of tax advice situations, and use the forms to help you navigate to compliance. It is a must for your training library and will help all staff during this coming tax season.

Program Highlights:

- The Traditional IRA
- The Roth IRA
- The SEP and SIMPLE IRAs
- Transfers and Rollovers
- Premature Distributions
- Required Minimums
- Death Distributions
- Reporting and Forms

Who Should Attend:

Branch Managers, Loan Officers, Customer Service Representatives, Tellers, Deposit Operations, Deposit Compliance, Branch Administration, BSA Officer, BSA staff, Compliance Officers, and others who open accounts for retirement.

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 _____
Cell _____

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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***Please Note: Recordings are not eligible for SBET funding**

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