



IRA Basics

February 16, 2011 ▪ 9:00am - 4:00pm

Midsouth Bank ▪ Lafayette, LA

****Note change in location ****



“Green” Seminar - visit <http://www.lba.org/content.cfm?id=46> for more info!

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

Workshop Topics

- Overview of IRAs
- Traditional IRA
- Roth IRA
- Qualified Retirement Plan Rollovers
- Simplified Employee Pension Plan
- Moving and changing IRAs
- Coverdell Education Savings Accounts
- Basics on premature distributions
- Basics on 70 1/2 distributions



Who Will Benefit

All IRA administrators, personal bankers, trust officers, customer service representatives, and those selling or discussing these products with their customers.

Registration Fee

\$205, per LBA member

\$305, per non-member

Workshop Instructor



Christy Crawford is Assistant Vice President with gettechnical, Inc. in Baton Rouge, LA. Formerly a trainer for one of the U.S.’s largest corporations, Christy brings her eight years of sales and training expertise to financial institutions. She has a Bachelor’s degree in Speech Communication from Louisiana State University. She brings humor, youth and vitality to the programs she teaches.



IRA Basics

February 16, 2011 ▪ 9:00am - 4:00pm

Midsouth Bank ▪ Lafayette, LA

****Note change in location ****



“Green” Seminar - visit <http://www.lba.org/content.cfm?id=46> for more info!

Registration Form

	Name	Email Address
Mr./Mrs./Ms.	_____	_____
Mr./Mrs./Ms.	_____	_____
Bank	_____	
Address	_____	
City/State/Zip	_____	
Phone	_____	Fax _____

Payment Options

Check (Made payable to the Louisiana Bankers Association)

Visa MasterCard

Card # _____ Expiration Date _____

Credit Card Billing address _____

Name on Card (Please Print) _____

Signature _____ Amount to be Charged on Card _____

I am unable to attend. Please send me _____ copies of the CD for \$125 (includes shipping and handling)

This training will be covered under SBET (Small Business Employee Training Program). Please send me necessary documentation for reimbursement.

***CD's will be shipped after the seminar.**

Location

Midsouth Bank Training Room
8th Floor Conference Room
102 Versailles Blvd.
Lafayette, LA 70501

Agenda

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

Registration Fee

\$205, per LBA member
\$305, per non-member

Cancellation Policy & Registration Deadline

*Due to facility commitments, registrations must be made by **January 14, 2011**. Cancellations received after January 14, 2011 will be charged a \$100 cancellation fee. We need a minimum of 25 attendees to hold this seminar. Any registrant who does not cancel will be billed the full registration fee and sent the manual. Substitutions are welcome at no additional charge.

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