



IRA Basics

November 8, 2017 ■ 9:00am - 4:00pm
The Bankers Center ■ Baton Rouge, LA

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

- What's new with IRAs
- 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

\$250, per LBA member

\$450, per non-member

Workshop Instructor



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.