



# IRA/HSA Update & Review (Webinar)

## February 1, 2021 ☐ 3:30pm - 5:00pm

Already know the basics on IRAs and HSAs? Just need the new information and a good review for the 2020-21 tax year? This is the program for you. It is designed for the banking professional with some IRA knowledge and provides a comprehensive review of what is new and intricate with these products.

### Program Topics:

- All new IRA numbers for contributions
- All new numbers for Roth and Traditional phase outs
- Implications of the Tax Cuts Jobs Act
- Review of products
- Distributions
- New Reporting Codes
- Self-Certifications
- Inherited IRAs
- Reporting Changes
- Combat zones and disaster relief
- CARES Act
- SECURE Act
- Telehealth and new medical expenses for HSAs
- And much, much more

### Who Should Attend:

IRA administrators, new accounts, personal bankers, branch administration, deposit operations, branch managers, BSA officers, training and business development personnel.

### 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 \_\_\_\_\_  
 Office 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 \_\_\_\_\_  
 Billing Address: \_\_\_\_\_

### Please check:

#### **Registration Fees for LBA Members**

- Live Webinar Connection      \$165 per connection
- Webinar Recording                \$165 per recording

#### **Registration Fees for Non-Members**

- Live Webinar Connection      \$265 per connection
- Webinar Recording                \$265 per recording

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:

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

Submit Registration and view rosters in the Education Section of the LBA's website, [www.lba.org](http://www.lba.org)

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