



IRAs A– Z (Virtual)

This program has been changed to a virtual program via Zoom.

March 19, 2021 ■ 9:00am - 4:00pm

The IRA class 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 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.

Program Topics

- What's new with IRAs
- Overview of IRs
- Traditional IRAs
- Roth IRAs
- Simplified Employee Pension Plan
- SIMPLES
- Moving and changing IRAs
- Qualified Retirement Plan Rollover
- Premature distributions
- 70 1/2 distributions
- Inherited IRAs
- Compliance Issues and Reporting to the IRS
- Coverdell Education Savings Accounts

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 Virtual Live Seminar OR Virtual Seminar Recording: \$265
Non-Member Fee for Virtual Live Seminar OR Virtual Seminar Recording: \$465

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.



IRAs A-Z (Virtual)

This program has been changed to a virtual program via Zoom.

March 19, 2021 ■ 9:00am - 4:00pm

Registration Form

Registrant 1

Registrant 2

| | |
|--|--|
| Mr./Mrs./Ms. _____ | Mr./Mrs./Ms. _____ |
| Bank _____ | Bank _____ |
| Email Address _____ | Email Address _____ |
| Branch Street Address _____ | Branch Street Address _____ |
| City, State, Zip _____ | City, State, Zip _____ |
| Phone _____ | Phone _____ |
| Cell _____ | Cell _____ |
| Please check: <input type="checkbox"/> Virtual Live Seminar OR <input type="checkbox"/> Virtual Seminar Recording | Please check: <input type="checkbox"/> Virtual Live Seminar OR <input type="checkbox"/> Virtual Seminar Recording |

Please note: If you participate in Virtual Live Seminar, we will email a certificate to you following the program. Certificates will only be emailed 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.

Registration Fee
Member Fee for Virtual Live Seminar OR Virtual Seminar Recording: \$265
Non-Member Fee for Virtual Live Seminar OR Virtual Seminar Recording: \$465

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 are not eligible for SBET funding.**

Location
 The Bankers Center
 5555 Bankers Avenue
 Baton Rouge, LA 70808

Agenda

| | |
|---------|------------------|
| 9:00am | Program Begins |
| 12:00pm | Lunch Break |
| 4:00pm | Program Adjourns |

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