2021 IRA 4-Part Study (Webinars)

Registration is per part, you do not have to register for the entire 4 part series.

During the IRA Study, we will make our way through products, movements, distributions, and, reporting and compliance. For those of you attending all four sessions we will work hard to develop your expertise as IRA Coordinators and Administrators for your bank. You will receive the latest version of the IRA Handbook.

Place a check next to each live webinar (WEB) and/or recording (REC) you would like to register for/order:
Registration fee (per webinar or recording): $165 per connection/LBA members; $265 per connection/nonmember

June 3, 2021 - IRA Study Part I: Products - 10:00am-11:30am ☐ **WEB** ☐ **REC**

This IRA webinar is designed for those new to IRAs or is 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 an account holder's retirement strategy and all the different types of IRAs and their eligibility requirements. This webinar will include information on contributions and distributions as well as death distributions. Attendees will leave with less apprehension about their responsibilities and compliance issues for opening IRAs at the financial institution. Topics include:

- The Ins and Outs of all four IRA products: Traditional IRA, Roth IRA, Qualified Retirement Plan Rollovers, Simplified Employee Pension Plan, Moving and Changing IRAs, Coverdell Education Savings Accounts

July 26, 2021 - IRA Study Part II: Movements – 3:30pm-5:00pm ☐ **WEB** ☐ **REC**

This IRA webinar is designed for those who work with customers to move IRA funds. It is designed for new account specialists and IRA administrators to help your financial institution "get it right" when a customer is moving money to your institution. This detailed webinar will take each type of movement and walk you right through how it should be done. Topics include:

- Rollover from IRA to IRA
- Transfers from IRA to IRA
- Qualified retirement plan rollovers
- IRA waiver or 60 day rule
- Recharacterizations
- Conversions
- Other special rollovers and revocations
- Self Certifications and new codes
- COVID 19 Rollovers

August 30, 2021 - IRA Study Part III: Distributions & Compliance - 3:30pm-5:00pm ☐ **WEB** ☐ **REC**

During this webinar we will study all the distribution and compliance issues for IRAs. We will look at early distributions, excess distributions and required minimum Distributions. You will review all the compliance issues for both opening and closing accounts. This is an information packed session with everything you need to gain a complete understanding of IRA rules and compliance. Topics include:

- Premature distributions
- Excess Distributions
- Required Minimum Distributions
- Forms to Open and Close
- Withholding on IRAs
- IRS Reporting

September 13, 2021 - IRA Study Part IV: Inherited & Death Distributions - 3:30pm-5:00pm
☐ **WEB** ☐ **REC**

During this webinar we will look at all the complex issues of IRAs. We will cover the complexities of the new inherited IRA under the SECURE Act. The life cycle of your IRA customer includes the final passage of the funds to the beneficiaries. Learn all the new IRA rules on inherited IRAs. Receive an in-depth IRA Handbook updated both for the CARES Act and the SECURE Act. Topics include:

- How to set up and pay out an Inherited IRA
- How to report an inherited IRA on the 5498s
- Why an inherited IRA cannot be rolled over but must be transferred
- How to disclaim an IRA inheritance
- New SECURE rules on 10 year payout
- Who can still "stretch" the IRA over single life
- What happens if an estate or trust is the beneficiary of the IRA
- Calculating the payouts
- Impact of CARES Act on 2020 distributions
- Common errors on inherited IRAs
- How to document the inheritance and distribution of an inherited IRA
- Spouses option to treat as own

Who should attend:

This webinar series will benefit all IRA administrators, personal bankers, trust officers, customer service representatives and those selling or discussing these products with their customers or members.

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.

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Registration Form

Mr./Mrs./Ms. ____________________

Bank ____________________

Email Address ____________________

Branch Street Address ____________________

City, State, Zip ____________________

Phone ____________________

Cell ____________________

Payment Option

☐ Check (Made payable to Louisiana Bankers Association)

☐ Visa ☐ MasterCard ☐ American Express

Registration Fee (Per webinar and/or Recording)
$165, per LBA member
$265, per non-member

Card Number ____________________ Expiration Date ____________

Name on Card (please print) ____________________ Signature ____________________

Billing Address: ____________________

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:

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

Registration Fee (per webinar and/or recording)

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$265 per connection or recording/nonmembers

***Recording and materials will be sent after the live webinar.**

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

Louisiana Bankers Association
5555 Bankers Avenue
Baton Rouge, LA 70808
225-387-3282
Fax 225-343-3159

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