



2019 IRA 4-Part Webinar Series

IRAs continue to be an essential part of retirement planning. This series will clarify multiple IRA issues, including rollovers, distributions, error resolution, and other misunderstood areas.

Pick and choose the session(s) that best meet your training needs or purchase the entire series and Save 10%!

IRAs can be extremely complex so knowing the rules and how they are applied is crucial. This series will provide current information for those who deal face-to-face with accountholders and for staff who have IRA operational, compliance, or reporting responsibilities. It will also provide management with a solid understanding and appreciation of IRA rules and responsibilities. Areas addressed will include handling minimum distributions, error resolution, and rollovers versus transfers – one of the most incorrectly reported IRA areas.

IRA Series Topics

- Handling IRA Required Minimum Distributions & Roth Distributions
- Processing IRA Rollovers & Transfers
- IRA Reporting, Common Issues & Error Resolution
- Top 10 Most Misunderstood IRA Issues: Turning Confusion into Confidence

Session Dates & Descriptions

Tuesday, July 9, 2019; 1:00 – 2:30 p.m.
Processing IRA Rollovers & Transfers
Frank J. LaLoggia, LaLoggia Consulting, Inc.

Recent rule changes have expanded rollover opportunities under certain circumstances but have limited rollover opportunities under other scenarios. Changes bring opportunities to financial institutions that understand how to navigate and properly handle IRA rollovers and transfers. After this session, you will know how IRA owners and beneficiaries may move assets between IRA plans, and between employer retirement plans and IRA plans. Be prepared the next time an IRA owner requests a rollover or transfer.

Tuesday, August 6, 2019; 1:00 – 2:30 p.m.
IRA Reporting, Common Issues & Error Resolution
Frank J. LaLoggia, LaLoggia Consulting, Inc.

This can't-miss session about traditional and Roth IRA reporting responsibilities will be presented in easy-to-understand terms to ensure your financial institution is up-to-date on reporting and compliance issues. It will address traditional and Roth IRA governmental reporting requirements, participant notices, and statement requirements. From 1099-R and 5498 reporting, to RMD and beneficiary distribution reporting, this session will cover a lot of ground! Learn about common reporting mistakes and correction methods to meet your compliance responsibilities.

Tuesday, August 27, 2019; 1:00 – 2:30 p.m.
Top 10 Most Misunderstood IRA Issues: Turning Confusion into Confidence
Frank J. LaLoggia, LaLoggia Consulting, Inc.

Join us for an exceptional session that will update you on many issues facing IRA owners and IRA custodians. Current information, interpretations, and best practices will be included in this practical, easy-to-understand session. Are you following the latest IRS guidance on withholding and reporting regarding payments from IRAs to state unclaimed-property funds? Do you understand your responsibilities to monitor and calculate required minimum distributions versus required beneficiary death distributions? Which IRA transactions require written documentation by the IRA owner? Explore the most misunderstood IRA rules and turn confusion into confidence!

Monday, September 16, 2019; 1:00 – 2:30 p.m.
Handling IRA Required Minimum Distributions & Roth Distributions
Frank J. LaLoggia, LaLoggia Consulting, Inc.

Handling traditional IRA required minimum distributions (RMDs) and Roth IRA distributions are important components of administering any IRA program. This session will include a thorough review of the rules and best practices surrounding handling and calculating RMDs and Roth IRA distributions. New or experienced staff who meet face-to-face with IRA owners or have IRA operational or reporting responsibilities will gain a solid understanding of RMD and Roth IRA distribution rules and considerations.

100% Satisfaction Guarantee and Convenient!

Listen to the webinar via your: iPad, iPhone, or Android

Instructions will be emailed with the webinar link.

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Three Registration Options

1. Live Webinar – The **live webinar** option allows you to have **one internet connection from a single computer terminal**. You may have as many people as you like listen and watch from your office computer. Registrants receive a website address and passcode that allows entrance to the seminar. The session will be approximately 90 minutes, including question and answer sessions. Seminar materials, including instructions, passcode, and handouts will be emailed prior to the broadcast. You will need the most-current version of Adobe Reader available free at www.adobe.com.

2. RECORDED WEBINAR and FREE DIGITAL DOWNLOAD – Can't attend the live webinar? This option provides a recording of the live event, including audio, visuals, and handouts. We even provide the presenter's email address for follow-up questions. You will receive an email with the recorded webinar link, which can be viewed anytime 24/7, beginning 6 business days **after** the webinar. You will also receive instruction on how to download a **free digital copy** of the webinar to your PC, which you may keep and use indefinitely. The recorded webinar may **ONLY** be ordered for 6 months following the live webinar. In addition, the download must be completed within 6 months of the live webinar date.

3. BOTH LIVE WEBINAR, RECORDED WEBINAR, and FREE DIGITAL DOWNLOAD – Options 1 and 2 described above.

	Live Webinar/ Series	Recorded and Free Digital Download/ Series	ALL–Live Webinar, Recorded Webinar and Digital Download/Series
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