IRA Workshop Series
IRA Essentials & Advanced IRAs

September 27 & 28 2017 · 9:00 am—4:30 pm (lunch provided)
The Association Center
777 13th Street SE, Conf Rm B
Salem, Oregon

OREGON BANKERS ASSOCIATION

Whether you have little to no previous IRA knowledge or you are seasoned in this area, the IRA Workshop Series will provide you with the information you need to understand the issues related to IRAs, and will present you with the tools needed to apply what you learn to job-related situations. Taught by professionals from Ascensus, this in-person training provides an opportunity for interactive learning with the experts.

IRA Essentials
Wednesday, September 27, 2017

Who Should Attend?
This workshop is intended for those who need to learn the basics of Traditional and Roth IRAs, or those who want an updated, general refresher on IRA rules. This is a beginner's session, so no previous IRA knowledge is required.

Program Overview
This workshop gives attendees a solid foundation of IRA knowledge. Exercises are included throughout the day to help participants apply information to job-related situations. Attendees will leave this session able to work with IRA owners and process basic IRA transactions with confidence. Attendees should bring a hand-held calculator.

Program Highlights

» Identify the tax differences of a Traditional and Roth IRA
» Examine the process for establishing an IRA and the required documents
» Differentiate between the types of beneficiaries
» Identify the contribution limit and deadline
» Communicate contribution reporting deadlines
» Identify federal income tax withholding requirements
» Examine IRS penalties and penalty exceptions
» Summarize the tax consequences of IRA distributions
» Communicate distribution reporting deadlines
» Differentiate between a rollover and a transfer
» Recognize rollovers between IRAs and employer sponsored retirement plans.

Advanced IRAs
Thursday, September 28, 2017

Who Should Attend?
This workshop is intended for IRA administrators, personal bankers, or customer service personnel who have working knowledge of basic IRA operations and wish to expand their expertise and provide enhanced customer service.

Program Overview
This workshop builds on the attendees' knowledge of IRA basics to address some of the more complex IRA issues their financial organizations may handle.

Program Highlights

» Resolve contribution issues
» Calculate a required minimum distribution (RMD)
» Discuss the RMD rules and reporting requirements
» Describe beneficiary distribution options and deadlines
» Explain the restrictions on the movement between IRAs and the result of violating the portability restrictions
» Recognize the options available when moving from an employer-sponsored retirement plan to an IRA
» Recognize financial organization penalties
» Conduct a self audit
» Identify the difference between a true excess and a deemed excess
» Calculate net income attributable and describe the methods for correcting an excess contribution.

By attending IRA Essentials or Advanced IRAs, the following designations earn 6 CE credits per course.
Certified IRA Professional (CIP)
Certified IRA Specialist (CIS)
NAFCU Certified Compliance Officer (NCCO)

For the following designations, earn 7.25 CE credits per course.
- Certified IRA Services Professional (CISP)
- Certified Retirement Services Professional (CRSP)
- Certified Trust & Financial Advisor (CTFA)

IRA Workshop Series
Registration Form

Please duplicate form for additional registrants.

		Member/Non-Member
☐	IRA Essentials (Sept. 27)	$325 / $425
☐	Advanced IRAs (Sept 28)	$325 / $425
☐	Both IRA Workshops	$550 / $650

Registration includes lunch, refreshments and an IRA guidebook.

Name

Bank

Title

Address

Phone

Email

Method of Payment

☐ Check ☐ Bill Me (members only) ☐ Visa / MasterCard

Credit Card #

Expiration Date

3-Digit V Code

Signature

Billing Address (if different than above)

OREGON BANKERS ASSOCIATION

Send completed registration form to:

Oregon Bankers Association
Attn: Education Department
PO Box 13429
Salem, OR 97309

Email: choltmeier@oregonbankers.com
Fax: (503) 581-8714
Questions? (503) 576-4115

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