KBA University

Web Seminar

Traditional IRAs: Contributions Rollovers and Transfers

On-Demand now

Description

IRAs don't have to be difficult or scary. This is the second in a series of five IRA programs is designed to provide bank employees with the basics. Each program is approximately 45 minutes in length. Keeping it short has several advantages. Brevity promotes better retention and comprehension. Plus the training is easily incorporated into the workday. A detailed manual accompanies each program. Those participating are also encouraged to follow along using their Bank's IRA forms and disclosures.

Features

Contributions are deposits of new money to an IRA. IRS regulations establish contribution limits. It is the customer's responsibility to know how much they can contribute and deduct, but they still have questions. This program teaches contribution limits and catch-up amounts, and provides information necessary to respond to customer inquiries regarding deductibility of contributions.

Rollovers and transfers are ways to move existing traditional IRA funds from one IRA to another. There are significant differences in these two methods. This program defines these terms and outlines the allowances and requirements of each.

> **Those participating learn:**

- What are the contribution limits?
- When can contributions be accepted?
- Can a working spouse fund an IRA for a non working spouse?
- Who can make "catch-up contributions" and what are the limits?
- When can IRA contributions be deducted?
- What is the difference between a rollover and a transfer?
- How are contributions, rollovers and transfers reported to the IRS?

Note: Those viewing the presentation are encouraged to follow along using their bank's forms and disclosures.

Workshop Resources

This presentation includes audio, video and a power point slide show. A detailed manual is available for download. It is suggested a copy be made for each person participating in the program. For questions after the program a question and answer forum is provided as a part of the course. All questions are answered by the speaker and available to anyone purchasing the program.

Expected Audience

This course is designed for financial institution personnel who are new to IRAs, or need a refresher.

Speaker

Laura Wilson is a principal with Pegasus Educational Services, LLC. She is a gifted trainer who proves learning can be fun. Audiences routinely comment that her recollection of material content and sense of humor are unique among presenters on technical topics. At one time she served as the regulatory compliance trainer for a $3 billion savings bank. Later, she was a senior consultant and full-time trainer for a regional consulting firm for financial institutions. She has served on the faculty of the OTS' Level I Compliance School and the FDIC's Bank Operations and Compliance School for examiners. In addition to presenting seminars for seventeen state banking associations, she has been an instructor at compliance schools sponsored by the Iowa, Kentucky, Texas, and Pennsylvania bankers associations.

What is an On-Demand Course?

It is a training tool that gives you and your staff **on-demand six months unlimited access** to a variety of topics presented by names you trust—**for one low price**. Each course includes a video presentation from the speaker, audio and slides—plus a detailed manual for download and a Question and Answer Forum for answers anytime.

The process is simple. Enroll in a course, pay online with a credit card, and receive an e-mail immediately with your link to your course. The same login information and link is used to access all courses you purchase using your account. Your computer will need speakers to receive the audio presentation. There are no special hardware or software requirements to view the program. Presentations lasting in excess of one hour are broken down into 30 minute segments to make it easier to manage class participation time.

Special note to Trainers: This system gives you the ability to develop your online training library. Using one link, user name and password anyone in your organization is able to access the program for six months. The manual and other supporting materials are available to anyone with the login information. You forward the login information, assign the courses to watch and let the learning begin.

Registration

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Secure online registration allows you to enter your registration directly into our system, and receive your invoice immediately. You can pay with a Credit Card or generate an invoice to be faxed or mailed with a credit card # or check.

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[_] Traditional IRAs: Contributions Rollovers and Transfers $159

Running Time 35 Minutes

This course includes a detailed manual and video presentation

Full Name | Title

Bank

Street Address

City | State | Zip

Phone

E-mail ***required for registration and confirmation**

Payment Method: [ ] Visa [ ] Mastercard [ ] AMEX [ ] Check

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For Questions or to register by phone:
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A 3 or 4 digit code on the back for VISA /MC front for AMEX