WVBA ED-NET

Video Web Seminar

IRA

Roth IRAs: from Soup to Nuts

On-Demand now

Description

This is the fifth in a series of five IRA programs designed to provide bank employees with the basics. The focus of this program is Roth IRAs. Viewers learn the differences between traditional and Roth IRAs. The goal is to teach bank employees how a Roth IRA works and when it may be the best option for a customer.

Features

Roth IRAs are a mirror image of traditional IRAs. Contributions are not deductible and, if all conditions are met, distributions are not taxable. For U.S. taxpayers who are not eligible to make deductible IRA contributions or younger savers with years to allow the account to grow, the Roth IRA is a great option. This course provides answers to commonly asked questions and gives bank employees the information they need to recommend the Roth IRA option when appropriate.

This program teaches:

- who is eligible to open a Roth IRA,
- how to open the account,
- contribution limits and catch-up amounts,
- rollovers and transfers,
- what the term "Roth conversion" means and how it works,
- the taxation of distributions to participants and beneficiaries, and
- IRS regulations for reporting contributions and distributions.

Workshop Resources

This 1 hour and 26 minute 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 answer 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.

Live Chat is available with this program! Using our instant message system you are able to chat with the speaker in real time. The link to the speaker chat room is found in your course with other program resources. You will not need a speaker phone. All programs are on-demand. You do not have to wait for a scheduled date and time to participate in the program. To take full advantage of this opportunity, watch the presentation in advance and have your questions ready.

Just a reminder - our BankersVoice forum is always available for your follow-up questions.

Registration

Visit http://wwwspeakersmic.com/wvba

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.

Registrations will be processed when payment is received.

Fill out this form and Fax it to: 888.420.4806

Mail check payable to: Speakersmic.com LLC, with form to:

974 Breckenridge Ln., #253 Louisville, KY 40207

[_] Roth IRAs $249

Running Time 1 hour 26 Minutes

This course includes a detailed manual and video presentation

Live Chat—December 14, 2010—12:30 to 2:30 PM ET

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: call Speakersmic @ 888.325.0974