

IRA/HSA Review & Update 2011 Tax Year

WEBINAR OR ON-DEMAND WEB LINK
(LINK INCLUDES FREE CD ROM)

Tuesday, January 24, 2012

12 - 1:30 pm PT
1 - 2:30 pm MT
2 - 3:30 pm CT
3 - 4:30 pm ET

It's tax season again and your bank will have to kick into high gear for this busy time. To prepare, this IRA/HSA review will give you all the new numbers and changes for the 2011-2012 tax season. It is important to know any new regulatory issues, changes, and guidelines that will directly impact your customers for the current tax year and the year ahead. ***This webinar is not for beginners.*** It is for those who work with IRAs on the frontline and those who support the IRA department and management on complicated issues. This program will include a product review, information about how IRAs move and change, and how to manage the compliance and reporting piece of the 2012 tax year. Once you attend this webinar, you will be completely updated and ready for a great tax season.

Continuing Education: Attendance verification for CE credits provided upon request.



HIGHLIGHTS

- 2012 numbers for all IRA and HSA products
- Automatic IRA Savers Act introduced
- Reporting changes and highlights
- The charitable payment from 70 ½ customers goes another year
- Death distributions, premature distributions, and 70 ½ distributions
- Product review: Traditional versus Roth
- Moving IRAs from one institution to another
- Qualified Retirement Plans and IRA movement

WHO SHOULD ATTEND?

This informative session is not for beginners. It is designed for IRA coordinators, branch operations staff, trainers, customer service representatives, call centers, and all personnel who deal with IRAs and HSAs.

MEET THE PRESENTER

**Deborah L. Crawford,
gettechnical inc**



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Register Now!

To view prices please return to the webinar listing page.

Community Bankers Association of Oklahoma REGISTRATION FORM

| Date of Seminar | Name of Seminar | Live Webinar \$230 | On-Demand Link & Free CD Rom \$230 | Both Live Webinar & On-Demand Link (includes free CR Rom) \$350 | TOTAL |
|-----------------|-----------------|-----------------------|--|---|-------|
| | | | | | \$ |

***CD Rom for pc use only**

Name: _____ Bank: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

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**Hook up instructions and seminar materials will be emailed approximately
7 days prior to the seminar.**

**REGISTRATION AND PAYMENT INSTRUCTIONS – Please note invoices are not provided.
Mail registration form and check made payable to:**

Financial Education and Development, Inc., P.O. Box 1780, Helena, MT 59624

Fax registration form, including credit card number to (406) 442-2357.

Important Note if Paying by Credit Card: This form will serve as your receipt. Charges will show up on your credit card statement from Financial Education and Development, Inc.

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***NOTE: It is best to have all payments and registrations to us 10 days prior to the seminar to ensure timely receipt of hook up instructions and handout materials. We will do our best to accommodate late registrations.**

FOR QUESTIONS EMAIL: CBAO@financialedinc.com

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