

IRA Update Seminar

March 14, 2023

Hyatt Place South, Sioux Falls
4935 Lake Shore Blvd.
605.444.6833



Questions: Call the SDBA at 800.726.7322 or email events@sdba.com

■ SEMINAR OVERVIEW

The IRA Update builds on your knowledge of IRA basics to address some of the more complex IRA issues your financial organization may handle. This course includes how the transitions rules work, RMDs and death distributions. We will also discuss amending documents. This is a specialty session; some previous IRA knowledge is assumed. The instructor uses real-world exercises to help participants apply information to job-related situations.

■ COURSE HIGHLIGHTS

1. Death distribution options: How SECURE changed some of the options but how we still use some of the old beneficiary options
2. Creating inherited IRA accounts
3. Reporting to IRS in the “year of death” and then “year after death”
4. When and how to use the “W-4R” in 2023 and what happens to the “W-4P”
5. Review RMD rules and characteristics
6. Getting ready for year end and what happens in January: Fair Market Statements, RMD Notices and 1099-Rs
7. Life expectancy tables for 2023 RMD calculations and inherited IRA RMD calculations change
8. Amendment and plan agreement update
9. RMD age now 73
10. Legislative update – SECURE 2.0 updates

■ WHO SHOULD ATTEND?

- IRA administrators, personal bankers, or member services personnel who have a working knowledge of basic IRA operations and wish to expand their expertise and provide enhanced customer service;
- A financial professional who recognizes that IRAs play an integral role in retirement planning;
- A compliance specialist with procedural oversight of IRA policies and practices; or
- Support personnel responsible for promotional materials that describe the services provided by your financial organization.

■ SEMINAR PRESENTER

Matthew Dickinson has been working with IRAs for 19 years. Matthew not only instructs, but he listens and responds to special needs and involves his audience in an effective group learning experience. Attendees are encouraged to ask questions or share concerns throughout the program.

SCHEDULE

- 8:30 - 9:00 a.m. Registration
- 9:00 a.m. - noon Program
- 12:00 - 12:45 p.m. SDBA host luncheon
- 12:45 - 4:00 p.m. Program continues

REGISTRATION FEE

(Includes program, instruction materials, lunches and breaks.)

Member \$285
Non-Member \$385

IRA Update Seminar

March 14, 2023

Hyatt Place South, Sioux Falls

4935 Lake Shore Blvd.

605.444.6833

Register online at www.sdba.com or, **Return** form and payment to SDBA, PO Box 1081, Pierre, SD 57501, fax to 605.224.7835, or email to events@sdba.com.

Institution _____ Phone Number _____

Mailing Address _____

Employee	City	Email

Registration: Live, in-person - \$285/person for members or \$385/person for non-members

Payment Method: Total fees due: \$ _____



- Check enclosed.
- Please send me an invoice.
- I would like to use a credit card. Please contact me.

Cancellation Policy: 100% refund if canceled on or before 3/6/2023; 75% refund if canceled before 3/7/2023 through 3/9/2023; no refund if canceled after 3/9/2022. Substitutions allowed at any time.