

# IRA Fall Update Seminar

November 14, 2024

Virtual Via Zoom



*Questions: Call the SDBA at 800.726.7322 or email [events@sdba.com](mailto:events@sdba.com).*

## ■ SEMINAR DESCRIPTION

The IRA Update builds on the attendees' knowledge of IRA basics to address some of the more complex IRA issues their financial organizations may handle. This course includes how the SECURE Act really changes our two biggest topics: RMDs and death distributions and discusses any pending legislation. 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
2. Final SECURE 2.0 changed some of the options, but how old beneficiary options can be used.
3. Creating Inherited IRA Accounts
4. Reporting to IRS in the "year of death" and then "year after death."
5. Getting ready for year-end and what happens in January: Fair Market Statements, RMD notices, and 1099-Rs
6. Life expectancy table! RMD calculations and inherited IRA RMD calculations change
7. Amendment and plan agreement update
8. Legislative update

## ■ WHO SHOULD ATTEND?

- IRA administrator, personal banker, or member services personnel who has a working knowledge of basic IRA operations and wishes 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, CISP, has been working with IRAs for 18 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.

## REGISTRATION FEE

Registration \$290  
Non-Member fee \$390

## SCHEDULE

8:30-12:00 pm Program  
12:00-1:00 pm Lunch Break  
1:00-3:30 pm Program continues

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Register online at [www.sdba.com](http://www.sdba.com),

Email [events@sdba.com](mailto:events@sdba.com),

Mail form and payment to SDBA, PO Box 1081, Pierre, SD 57501 or

Fax to 605.224.7835.

Institution \_\_\_\_\_ Phone Number \_\_\_\_\_

Mailing Address \_\_\_\_\_

Employee	City	Email

Registration: \$290/person for members or \$390/person for non-members.

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### Payment Method:



Total fees due: \$ \_\_\_\_\_

Check enclosed.

Please send me an invoice.

Please bill credit card. (SDBA will call)

**Cancellation Policy:** 100% refund if canceled on or before 11/1/2024; 75% refund if canceled 11/2-11/8; no refund if canceled after 11/8.  
Substitutions allowed at any time.