

IRA Update Seminar

November 3, 2023

Virtual Via Zoom



Questions: Call the SDBA at 800.726.7322 or email 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: How SECURE 2.0 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. Review RMD rules and characteristics
5. Getting ready for year-end and what happens in January: Fair Market Statements, RMD notices, and 1099-Rs
6. Life expectancy tables for 2022! 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 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 \$285
Non-Member fee \$385

■ SCHEDULE

8:00 am Registration
8:30-12:00 pm Program
12:00-12:45 pm Lunch Break
12:45-3:30 pm Program continues

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Register online at www.sdba.com,

Email 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: \$285/person for members or \$385/person for non-members.

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 10/21/23; 75% refund if canceled 10/22 - 10/25; no refund if canceled after 10/25. Substitutions allowed at any time.