

# IRA Update Seminar

March 26, 2019

Ramkota Hotel

3200 West Maple St., Sioux Falls

605-336-0650



Questions: Call the SDBA at 800.726.7322 or email Halley Lee at hlee@sdba.com.

## SEMINAR DESCRIPTION

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 will also include all changes that have occurred and discuss any pending legislation. This is a specialty session; previous IRA knowledge is assumed. The instructor uses real-world exercises to help participants apply information to job-related situations.

## COURSE HIGHLIGHTS

### LEGISLATIVE UPDATE:

- A. Proposed legislation
  - 1) Family Savings Act
  - 2) RESA
- B. Trump Executive Order

### IRA Contribution

- A. Eligibility and deadlines
- B. Increased limits
- C. COLA increases
- D. SEP and SIMPLE changes
- E. Tax Savers

### IRA Transfer/IRA Rollovers/QRP Direct

#### Rollovers

- A. Explanation of each
- B. Self-Certification: What is it? How to report it?

### Conversions

- A. Rules
- B. Reporting
- C. Tax implications

### Excess Contributions

- A. What are they?
- B. How to correct them

### Recharacterizations

- A. What are they?
- B. How to report them
- C. How to report to the IRS

### Inherited IRAs

#### Reporting: 5498

## 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

Michael O'Brien has been a key player in the retirement services industry for more than 30 years. He has served as senior vice president of Integrated Retirement, vice president of retirement products and solutions at Ascensus, and senior consultant with Universal Pensions, Inc. O'Brien has provided consulting and educational services to all facets of the retirement industry.

## REGISTRATION FEE

Registration \$265  
Non-Member fee \$365

## CREDITS

We have applied for 6 hours of continuing education credits from the SD Div of Insurance.

## SCHEDULE

8:30-9:00 am Registration  
9:00-12:00 am Program  
12:00-12:45 pm SDBA host luncheon  
12:45-3:45pm Program continues

## HOTEL INFORMATION

Ramkota Hotel  
3200 West Maple St. – Sioux Falls  
605-336-0650

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

Return 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:** \$265/person for members or \$365/person for non-members.

Registration fee includes \$30 for meals and breaks. This information is provided for your tax records, in keeping with the IRS 50 percent deductible provision under Section 274 (n) of the Internal Revenue Code.

### Payment Method:

**Total fees due:** \$ \_\_\_\_\_  Check enclosed.  Please send me an invoice.

Please bill credit card.  Visa  MasterCard  Discover  American Express

Card Holder's Name \_\_\_\_\_ Zip Code \_\_\_\_\_

Credit Card No. \_\_\_\_\_ CVV \_\_\_\_\_ Expiration \_\_\_\_\_

Authorized Signature \_\_\_\_\_



**Cancellation Policy:** 100% refund if canceled on or before 3/18/19; 75% refund if canceled 3/20 - 3/21; no refund if canceled 3/22. Substitutions allowed at any time.