

IRA Update Seminar

November 4, 2021

Hyatt Place Sioux Falls South
4935 W. Lake Shore Boulevard
605.271.2871



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

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 new "W-4R" 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. New life expectancy tables for 2022. RMD calculations and inherited IRA RMD calculations change
8. Amendment and plan agreement update
9. 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

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 \$275
Non-Member fee \$375

CREDITS

We have applied for 6 hours of continuing education credits from the SD Division 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

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Register online at 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: \$275/person for members or \$375/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 _____



Educate. Advocate. Grow.

Cancellation Policy: 100% refund if canceled on or before 10/25/21; 75% refund if canceled 10/26 - 10/28; no refund if canceled after 10/28. Substitutions allowed at any time.