

# IRA Update Seminar

March 22, 2022

LIVE AND VIRTUAL VIA ZOOM

USD Community College for Sioux Falls

4801 N Career Avenue

605.274.9520



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

## SEMINAR OVERVIEW

The IRA Update builds on attendees' knowledge of IRA basics to address some of the more complex IRA issues their financial organizations 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" (NOW 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 2022 RMD calculations and inherited IRA RMD calculations change
8. Amendment and plan agreement update
9. Transition rules
10. Legislative update

## WHO SHOULD ATTEND?

- IRA administrators, personal bankers, 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.

## SCHEDULE

8:30-9:00 a.m. Registration

9:00 a.m.-12:00 p.m. Program

12:00-12:45 p.m. SDBA host luncheon

12:45-4:00 p.m. Program continues

## REGISTRATION FEE FOR LIVE, IN-PERSON

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

Member \$275  
Non-Member \$375

## REGISTRATION FEE FOR VIRTUAL

(Includes program and instruction materials.)

Member \$245  
Non-Member \$345

Zoom link will be sent via email on Friday, March 18<sup>th</sup>.

## IRA Update Seminar – Live and Virtual via Zoom

March 22, 2022

USD Community College for Sioux Falls

4801 N Career Avenue

Sioux Falls, SD 57107

605.274.9520

**Register online** at [www.sdba.com](http://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](mailto:events@sdba.com).

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

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

Employee	City	Email

**Registration: Live, in-person** - \$275/person for members or \$375/person for non-members; **Virtual** - \$245/person for members or \$345/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 3/11/2022; 75% refund if canceled before 3/15/2022; no refund if canceled after 3/20/2022. Substitutions allowed at any time.