

IRA Update Seminar

November 3, 2022

Ramkota Hotel

3200 W. Maple Street, Sioux Falls, S.D.

605.336.0650



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 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

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

HOTEL INFORMATION

Ramkota Hotel
3200 W. Maple Street, Sioux Falls, S.D.
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SCHEDULE

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

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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: \$285/person for members or \$385/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 AmericanExpress

Card Holder's Name _____ Zip Code _____

Credit Card No. _____ CVV _____ Expiration _____

Authorized Signature _____



Cancellation Policy: 100% refund if canceled on or before 10/21/22; 75% refund if canceled 10/22 - 10/25; no refund if canceled after 10/25. Substitutions allowed at any time.