Wolters Kluwer

When you have to be right

Financial Services

2018 Live Streaming Training Schedule - IRAs, HSAs and CESAs

Wolters Kluwer offers several convenient solutions to help you train your staff.

Live Streaming Video Training

Live Streaming Training brings our in-person training environment right to your computer or training room via any internet connected device. No more waiting for training to be scheduled in your area and employees no longer need to be away from the office to attend and learn. This option is available to everyone, everywhere, and our on-demand option is available anytime.

The fee is $299 for our two or three hour events and $199 for our ninety and sixty minute events (fees apply per connection, per session). Please note that additional registrations are required in order to log in from additional computers or locations.

Live Streaming Subscription

Trying to bring everyone together at one time for training can be difficult and often leaves your financial institution short staffed. Additionally, the expenses associated with training events can add up quickly. With our Live Streaming Subscription service you no longer need to worry because we offer over 100 professional training events throughout the year for you to choose from. Employees can now attend training when it is most convenient for them and your financial institution at a fraction of the cost of traditional training events.

Attend once, twice, or as many times as needed. You will always have access to the latest IRA and HSA information. If a change occurs during the year that requires training, you're covered at no additional cost. A subscription includes access to all of our Live Streaming IRA Content for 12 months, starting on your contract date.

Pricing is asset-based and starts as low as $999.

On-Demand Streaming Subscription

With On-Demand Live Streaming, you will have access to pre-recorded Live Streaming Trainings that you can watch at anytime, 24/7/365. The subscription allows you to have access to these training sessions for 12 months, starting at your contract date, and there is no limit to the number of employees or how many times on-demand training sessions are viewed.

Pricing is asset-based and starts as low as $1,299.

For more information or to register for live streaming video sessions visit www.WoltersKluwerFS.com/IRAseminars

Your subscription will include all of these sessions so you don't need to worry about not having access to the training you need, when and where you want it.

Basic IRA Training

- Overview and Establishment
- Contribution Eligibility
- Distribution Basics
- IRA-to-IRA Rollovers and Transfers

Intermediate IRA Training - Part 1

- Regular Contributions
- Distributions
- Required Minimum Distributions

Intermediate IRA Training - Part 2

- Beneficiary Options
- Rollovers, Transfers, and Conversions
- Employer Plan-to-IRA Rollovers

Advanced IRA Training

- Required Distribution Administration
- Death Distributions and IRA Administration
- Employer Plan Rollovers

Health Savings Accounts Training

- Overview and Establishment
- Regular Contributions
- Distributions
- Rollovers and Transfers
- Special Topics
- IRS Reporting

IRA Documentation Training

- Establishment
- Contributions
- Distributions
- Portability

Beneficiary IRA Administration Training

- The importance of providing adequate attention to an IRA after an owner's death
- Administering an IRA after an owner's death
- Beneficiary IRA reporting

Roth IRA Training

- Overview and Establishment
- Contribution Eligibility
- Distributions
- Beneficiary Options

IRA Reporting Training

- Understanding and interpreting different reports
- Reporting responsibilities
- Reporting deadlines

IRA Self-Audit Training

- Operating a compliant IRA program
- Establishment documents and disclosures
- Proper and timely reporting

IRA Policies and Procedures Training

- The importance of having written policies
- Items a financial organization may wish to address via a policy
- The importance of having procedures in place for both common and uncommon IRA related issues

Simplified Employee Pensions Training

- The relationship between a SEP and an IRA
- A financial organization's role as it applies to SEPs
- The benefits of a SEP and the reasons why
- many employers offer them

Coverdell Education Savings Accounts Training

- How a CESA differs from other deposit accounts
- Designated Beneficiary and Contributor eligibility rules
- Properly administering CESAs

Required Minimum Distributions Training

- The components necessary to calculate an RMD
- RMD aggregation, rollovers and transfers, and taxation
- Penalties and reporting
- Options for satisfying the annual RMD statement requirement

(All Sessions are Central Time)

Basic IRA Training

1/9/18	11:00 - 2:00
2/6/18	11:00 - 2:00
3/6/18	1:00 - 4:00
4/3/18	8:00 - 11:00
5/8/18	11:00 - 2:00
6/5/18	1:00 - 4:00
7/10/18	8:00 - 11:00
8/7/18	11:00 - 2:00
9/11/18	1:00 - 4:00
10/9/18	8:00 - 11:00
11/6/18	11:00 - 2:00
12/4/18	1:00 - 4:00

Intermediate IRA Training Part 1

1/16/18	11:00 - 2:00
2/13/18	11:00 - 2:00
3/13/18	1:00 - 4:00
4/10/18	8:00 - 11:00
5/15/18	11:00 - 2:00
6/12/18	1:00 - 4:00
7/17/18	8:00 - 11:00
8/14/18	11:00 - 2:00
9/18/18	1:00 - 4:00
10/16/18	8:00 - 11:00
11/13/18	11:00 - 2:00
12/11/18	1:00 - 4:00

Intermediate IRA Training Part 2

1/18/18	11:00 - 2:00
2/15/18	11:00 - 2:00
3/15/18	1:00 - 4:00
4/12/18	8:00 - 11:00
5/17/18	11:00 - 2:00
6/14/18	1:00 - 4:00
7/19/18	8:00 - 11:00
8/16/18	11:00 - 2:00
9/20/18	1:00 - 4:00
10/18/18	8:00 - 11:00
11/15/18	11:00 - 2:00
12/13/18	1:00 - 4:00

Advanced IRA Training

1/23/18	11:00 - 2:00
2/20/18	11:00 - 2:00
3/20/18	1:00 - 4:00
4/11/18	8:00 - 11:00
5/22/18	11:00 - 2:00
6/19/18	1:00 - 4:00
7/24/18	8:00 - 11:00
8/21/18	11:00 - 2:00
9/25/18	1:00 - 4:00
10/23/18	8:00 - 11:00
11/14/18	11:00 - 2:00
12/18/18	1:00 - 4:00

Health Savings Accounts Training

1/11/18	11:00 - 2:00
2/8/18	11:00 - 2:00
3/8/18	1:00 - 4:00
4/5/18	8:00 - 11:00
5/10/18	11:00 - 2:00
6/7/18	1:00 - 4:00
7/12/18	8:00 - 11:00
8/9/18	11:00 - 2:00
9/13/18	1:00 - 4:00
10/11/18	8:00 - 11:00
11/8/18	11:00 - 2:00
12/6/18	1:00 - 4:00

IRA Documentation Training

1/17/18	10:00 - 12:00
3/14/18	1:00 - 3:00
5/16/18	10:00 - 12:00
7/18/18	1:00 - 3:00
9/19/18	10:00 - 12:00
11/28/18	1:00 - 3:00

Beneficiary IRA Administration Training

1/25/18	10:00 - 11:30
3/22/18	1:00 - 2:30
5/24/18	10:00 - 11:30
7/26/18	1:00 - 2:30
9/27/18	10:00 - 11:30
11/29/18	1:00 - 2:30

Roth IRA Training

2/22/18	10:00 - 11:30
4/12/18	1:00 - 2:30
6/21/18	10:00 - 11:30
8/23/18	1:00 - 2:30
10/25/18	10:00 - 11:30
12/20/18	1:00 - 2:30

SESSION LEGEND

3 Hours | 2 Hours | 90 Minutes | 60 Minutes

(All Sessions are Central Time)

IRA Reporting Training	
2/7/18	10:00 - 11:00
5/9/18	1:00 - 2:00
8/8/18	10:00 - 11:00
11/7/18	1:00 - 2:00

IRA Self-Audit Training	
1/10/18	10:00 - 11:00
4/4/18	1:00 - 2:00
7/11/18	10:00 - 11:00
10/10/18	1:00 - 2:00

Simplified Employee Pensions Training	
3/7/18	1:00 - 2:00
6/6/18	10:00 - 11:00
9/12/18	1:00 - 2:00
12/5/18	10:00 - 11:00

IRA Policies and Procedures Training	
1/10/18	1:00 - 2:00
4/4/18	10:00 - 11:00
7/11/18	1:00 - 2:00
10/10/18	10:00 - 11:00

Coverdell Education Savings Accounts Training	
3/7/18	10:00 - 11:00
6/6/18	1:00 - 2:00
9/12/18	10:00 - 11:00
12/5/18	1:00 - 2:00

Required Minimum Distributions Training	
2/7/18	1:00 - 2:00
5/9/18	10:00 - 11:00
8/8/18	1:00 - 2:00
11/7/18	10:00 - 11:00

SESSION LEGEND

3 Hours | 2 Hours | 90 Minutes | 60 Minutes

About Wolters Kluwer Governance, Risk & Compliance

Wolters Kluwer Governance, Risk & Compliance (GRC) is a division of Wolters Kluwer which provides legal, finance, risk and compliance professionals and small business owners with a broad spectrum of solutions, services and expertise needed to help manage myriad governance, risk and compliance needs in dynamic markets and regulatory environments. The division's prominent brands include: AppOne®, AuthenticWeb™, Bankers Systems®, BizFilings®, Capital Changes, CASH Suite™, CT Corporation, CT Lien Solutions, ComplianceOne®, Corsearch, Expere®, GainsKeeper®, LegalVIEW®, OneSumX®, Passport®, TyMetrix® 360, Uniform Forms™, VMP® Mortgage Solutions and *Wiz*®.

Wolters Kluwer N.V. (AEX: WKL) is a global leader in information services and solutions for professionals in the health, tax and accounting, risk and compliance, finance and legal sectors. Wolters Kluwer reported 2016 annual revenues of €4.3 billion. The company, headquartered in Alphen aan den Rijn, the Netherlands, serves customers in over 180 countries, maintains operations in over 40 countries and employs 19,000 people worldwide.

179476089 2018 IRA Live Streaming Training Schedule

Wolters Kluwer

When you have to be right