

Make Your IRA Program



Bloom

2011-2012 Fall and Winter IRA Seminar Tour

A vibrant IRA program attracts account owners to your organization and creates more opportunities to cross-pollinate. But with so many rules, keeping up is a challenge.

You don't have to be as busy as a bee to understand IRAs. We'll help you make sense of rules to save you time, your organization money, and keep you both in compliance.

Flourish with our Fall and Winter IRA Seminar Tour

Deepen your IRA knowledge where you need it most. Our experts will cover a wide range of topics, so you don't lag behind in any area.

Cost

The registration fee is **\$195** for the first registrant and **\$180** for each additional registrant from the same financial institution.*

The fee includes seminar materials, beverages, and a light lunch. All travel-related expenses, including parking fees and breakfast, are the responsibility of the seminar attendees or their financial organizations.

**If a seminar is sponsored by an organization other than Wolters Kluwer Financial Services, pricing is determined by the sponsoring organization. You will be directed to that organization's website for registration.*

IRA Principles

For those who are looking for a broad-spectrum view of IRAs. Perfect for those with IRA experience but not too overwhelming for those who do not.

- Establishment Overview and Regular Contributions
- Distributions
- IRA-to-IRA Rollovers, Transfers, and Conversions
- Employer Plan-to-IRA Rollovers and Direct Rollovers
- Required Minimum Distributions
- Beneficiary IRA Administration
- Appendix: Health Savings Accounts

Advanced IRAs

For those who understand the IRA basics and want a deeper understanding of the rules and regulations as they apply to IRA and HSA administration.

- Required Minimum Distributions
- Beneficiary IRA Administration
- Distributions
- Moving Assets Between IRAs
- Moving Assets Between Employer Plans and IRAs
- Health Savings Accounts

Register online today at www.WoltersKluwerFS.com/IRAseminars
or call 800.552.9410.



Illinois

Chicago (Arlington Heights) - Courtyard by Marriott

- IRA Principles—10/18/11

Chicago (Naperville) - Holiday Inn

- IRA Principles—2/29/12

Chicago (Oak Lawn) - Hilton Oak Lawn

- Advanced IRAs—9/28/11

Chicago (Schaumburg) - Doubletree

- Advanced IRAs—3/1/12

Moline - Stoney Creek Inn & Conf.

- IRA Principles—10/20/11
- Advanced IRAs—1/12/12

Mount Vernon - Fairfield Inn

- IRA Principles—10/5/11
- Advanced IRAs—3/6/12

Illinois (cont.)

Peoria - Sheraton

- IRA Principles—9/20/11

Rockford - Holiday Inn

- IRA Principles—10/19/11
- Advanced IRAs—1/10/12

Springfield - President Abraham Lincoln Hotel

- IRA Principles—9/21/11
- Advanced IRAs—9/22/11

Springfield - Hilton Garden Inn

- IRA Principles—3/7/12
- Advanced IRAs—3/8/12

Urbana (Champaign) - Holiday Inn

- IRA Principles—9/27/11
- Advanced IRAs—2/28/12

Utica - Starved Rock Lodge & Conf.

- Advanced IRAs—1/11/12



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