Community Bankers Association of Illinois

Webinar – On-Demand Web Link

IRA Series: Understanding IRA Beneficiary Designations, Death Distributions & Required Minimum Distributions

Wednesday, July 11, 2018

2 - 3:30 p.m.

Managing IRA beneficiary designations and explaining allowable distribution options to IRA beneficiaries may be the most complex part of administering an IRA program. Designed for IRA staff with operational, reporting or managerial responsibilities or direct IRA owner contact, this session provides a thorough understanding of the rules and best practices surrounding IRA beneficiary designations and required death distributions. In addition, you learn your responsibilities when calculating, handling, and processing required minimum distributions (RMDs) from Traditional IRA accounts.

HIGHLIGHTS

- Understand the four most common categories of beneficiary designations
- Review proper documentation of beneficiary designations
- Discuss allowable beneficiary distribution options
    - Review of quick reference beneficiary options chart
- Learn the obligations of the IRA custodian regarding the notification and calculation of required minimum distributions
- Know how to properly calculate RMDs
- Analyze the RMD reporting requirements to the IRS and the IRA owner

TAKE-AWAY TOOLKIT

- Employee training log
- Quiz you can administer to measure staff learning and a separate answer key

Attendance verification for CE credits provided upon request.

WHO SHOULD ATTEND?

This session is designed for individuals who deal with IRAs, whether face-to-face with IRA account owners, behind the scenes in the IRA operations area, or in a supervisory or managerial capacity. Licensed insurance representatives and registered representatives also benefit. After this session, you have a greater understanding of what is important and required when handling and processing IRA beneficiary designations, distributions, and required minimum distributions.

ABOUT THE PRESENTER

Frank LaLoggia is the president of LaLoggia Consulting, Inc., Rochester, NY, a pension and financial consulting firm that assists financial organizations with ongoing support in the creation, development, and marketing of their retirement plans and financial-services offerings. LaLoggia coordinates and conducts pension and financial seminars and training programs throughout the United States, including in-house IRA, HSA, and employer retirement plan training. With over 35 years' experience in employee benefits, and always in demand, his client list is impressive. He has assisted many leading financial organizations in the pension and financial services industries. LaLoggia has achieved the designation of Deferred Compensation Specialist through Northeastern Universities Center for Continuing Education and The National Retirement Plans Training Conference.

THREE REGISTRATION OPTIONS

1. LIVE WEBINAR

The live webinar option allows you to have one telephone connection for the audio portion and one Internet connection (from a single computer terminal) to view online visuals as the presentation is delivered. You may have as many people as you like listen from your office speaker phone. Registrants receive a toll-free number and pass code that allow entrance to the seminar. The session is approximately 90 minutes, including question and answer sessions. Seminar materials, including instructions, PIN number, and handouts are emailed to you prior to the broadcast. You need the most-current version of Adobe Reader available free at www.adobe.com.

2. ON-DEMAND WEB LINK**

Can't attend the live webinar? The ON-DEMAND WEB LINK** is a recording of the live event including audio, visuals, and handouts. We even provide the presenter's email address so you may ask follow-up questions. Within five business days following the webinar, you are provided with a web link that can be viewed anytime for the next six months. This link expires six months after the live program date.

3. BOTH LIVE WEBINAR AND ON-DEMAND WEB LINK**

Includes options 1 and 2 above.

NEW! Listen to the on-demand web link on your iPad, iPhone, or Android. Instructions are emailed to you with the on-demand link.

AFFORDABLE TRAINING, WHEN AND WHERE YOU CHOOSE.

Registration Form

IRA Series: Understanding IRA Beneficiary Designations, Death Distributions & Required Minimum Distributions Telephone/Webcast

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Choose Your Training Option:

Purchase (Check one)	**Training Options** ***(Registration includes one location hook-up)***	**CBAI Member**	**Prospective-Member***
	Live Webinar	$275	$475
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☐ Check here if you are unable to receive your hook-up instructions and materials via the Internet and hard copies will be mailed to you.

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