# Community Bankers Association of Illinois

## Webinar – On-Demand Web Link

### IRA Series: IRA Overview: Traditional & Roth IRA & SEP Plans
### Thursday, March 15, 2018
### 2 - 3:30 p.m.

Whether IRAs are new to you, or you want a good refresher on traditional and Roth IRA rules, this is a must-attend session. From plan establishment, eligibility, and contribution rules, to basic beneficiary, distribution, and portability rules, this program will explore the important concepts that have the greatest impact on your IRA accountholders. You will learn about Simplified Employee Pension (SEP) plans and how easily SEP contributions can be made directly into existing traditional IRAs. This webinar also addresses many important compliance considerations, including your responsibilities as the financial institution sponsoring the IRA plan versus the IRA holders' responsibilities.

**HIGHLIGHTS**

- Requirements to properly establish an IRA plan
- IRA eligibility and contribution rules
- Differences between IRA rollover and IRA transfer rules
- Analyze basic beneficiary rules and choices for traditional and Roth IRAs
- Fundamental concepts of SEP plans
- Financial institution responsibilities vs. IRA owner responsibilities

**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 provides important information for staff who deal with IRA or small business owners. It is also designed for individuals with IRA operational, supervisory, or managerial responsibilities. Licensed insurance and registered representatives benefit from this lively, well-paced program, too.

**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 more than 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: IRA Overview: Traditional & Roth IRA & SEP Plans Telephone/Webcast**
**Thursday, March 15, 2018 2 - 3:30 p.m.**

**Choose Your Training Option:**

| **Purchase** (Check one) | **Training Options** ***(Registration includes one location hook-up)*** | **CBAI Member** | **Prospective-Member*** |
|---|---|---|---|
| | Live Webinar | $275 | $475 |
| | On-Demand Link** | $275 | $475 |
| | **Special Pricing** for Live Webinar & **On-Demand Link** | $375 | $575 |

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(E-mail address is required for registration).

**Material Delivery Options**

☐ 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.

***Only financial institutions/firms eligible for CBAI membership.**

**Please select your payment method.**

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**Please note: On-demand link is available five days after the webinar date and expires six months after.**