Community Bankers Association of Illinois

Webinar – On-Demand Web Link

IRA Series: Current IRA Issues, Including Divorce, IRS Levies, Bankruptcies & Creditor Claims
Wednesday, May 16, 2018
2 - 3:30 p.m.

Are you up-to-date with the important issues facing both IRA owners and custodians? How do you handle IRA distributions due to divorce? When are IRA accounts subject to an IRS levy request? What are the best practices for dealing with power-of-attorney requests, IRA beneficiary disclaimers, and remitting abandoned IRA assets to the state? This session covers these important issues that impact your IRA program.

HIGHLIGHTS

- Handling a transfer versus a distribution subject to divorce notice
- How to process IRS levy requests
- Learn when IRA accounts are not subject to a levy notice
- Scope, authority, limitations, and best practices regarding powers-of-attorney
- Requirements of a valid beneficiary disclaimer
- Why some beneficiaries want to disclaim IRA assets
- An IRA custodian's responsibilities when remitting abandoned property, including federal income tax withholding implications

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 practical and timely information to staff who have IRA operational, compliance, reporting, or managerial responsibilities. It also provides those with direct IRA owner contact, including service representatives, licensed insurance representatives, and registered representatives, with current information and reference tools needed to confidently provide answers to commonly asked questions.

ABOUT THE PRESENTER
Frank J. 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

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Choose Your Training Option:

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