

IRA Grand Slam

IRA School: Two days & four sessions of intense IRA training

The IRA School is a must for all persons involved with IRAs. We address the purpose of IRAs, the role IRAs play in a member's retirement strategy and all the different types of IRAs and their eligibility requirements. IRAs are constantly changing and it is important to keep up-to-date with the new issues that the IRS puts out.

Day one prepares you to open, move and close IRAs, and get all the paperwork right in the process. Learn more about IRA eligibilities, SEPs and SIMPLES, rollovers, and transfers.

The second day takes you on a "deeper dive" of IRAs. You receive a quick product review and new numbers and changes for 2017. We also begin to work the complicated issues—reporting errors and fixes, excess contributions, audits, and inherited IRAs.

DAY ONE: THE BASICS

Day One Module One

- Two choices for individuals
- Traditional IRA & roth IRA
- Two choices for business
- Simplified Employee Pension Plan (SEP)
- Savings Incentive Match Plan (SIMPLE)

Day One Module Two

- Rollover versus transfers from IRA to IRA
- Rollover from Qualified Retirement Plans
- Premature Distributions
- The Basics on 70 ½ & death distributions
- The Coverdell Education Savings Account
- An Introduction to the Health Savings Account

DAY TWO: ADVANCED

Day Two Module Three

- Quick Product Review
- Questions & answers accountholders ask
- Updated information on changes on IRAs & HSAs
- 70 ½ Distributions an in-depth look
- Inherited IRAs-Spouse & nonspouse options; Estates & trusts
- IRA, CESA, HSA reporting, & compliance issues
- Every single distribution code & what each means
- How to audit your accounts

Day Two Module Four

- Two types of transfers & two types of rollovers
- Recharacterizations, conversions, & reconversions
- Special movements on IRAs—military, bankruptcy & qualified reservists
- More on the Health Savings Accounts
- Correcting Errors on IRAs
- IRA Administrator's Tools for Success

WHO SHOULD ATTEND?

Retirement savings plan professionals at all levels should attend.

DATE & LOCATION

Dallas – September 27 – 28, 2017

The Crowne Plaza – Dallas Galleria, 14315 Midway Road, Addison, TX 75001; P: (972) 980-8877; Rate: \$149/night

SCHEDULE AT A GLANCE (SUBJECT TO UPDATES)

Wednesday, Sept. 27, 2017

8:30 – 9:00 a.m. – Registration & Continental Breakfast
Noon – 1:00 p.m. – Networking Lunch

9:00 – Noon – Session
1:00 – 4:00 p.m. – Session

Thursday, Sept. 28, 2017

8:00 – 8:30 a.m. – Continental Breakfast
Noon – 1:00 p.m. – Networking Lunch

8:30 – Noon – Session
1:00 – 3:30 p.m. – Session

PRESENTERS



Deborah L Crawford – Debbie is the President of Gettechnical Inc, a Virginia based training company. Her combined banking and training experience began in 1984 and she is a deposit side expert. She received her Bachelors and masters degrees from Louisiana State University.

Christy J Crawford – Christy is an instructor for Gettechnical Inc. She bases out of Florida and has been doing IRA training for 10 years. She has her degree from Louisiana State University and began her career as an instructor for a large US company. Her combined teaching and training experience is shared nationwide with many state associations and leagues around the country.



CORNERSTONE
CREDIT UNION LEAGUE
IRA School
Registration Form

One attendee per registration form. Please make additional copies if needed.

HOTEL ACCOMMODATIONS

Attendees are responsible for making their own sleeping room reservations. Be sure to indicate to the hotel that you are with the CSCUL group, to receive the special sleeping room rate. Rooms are available on first-come, first serve-basis.

FEE PER PERSON (League affiliated credit unions only)

Early Bird Rate \$649 (Deadline August 16, 2017)

Regular Fee \$749

Walk-ins accomadated on a space available basis. Your investment inclues instruction, extensive handouts, continental breakfast, a networking lunch, and two refreshment breaks.

TWO EASY PAYMENT METHODS- PLEASE CHECK ONE

Option 1: For payments via credit cards (Mastercard, Visa, or American Express) & Catalyst Corporate FCU, please visit us online at <http://www.cornerstoneleague.coop/>.

Option 2: I authorize Catalyst Corporate FCU to debit the credit union account for

\$ _____ Account # _____ Authorized Signature _____

Three Convenient Ways to Register

1. Online: <http://www.cornerstoneleague.coop/education.html>.

2. Fax this completed form to (469)385-6642

3. Mail this completed form to:

Attn: Training & Events, IRA School, 6801 Parkwood Blvd., Suite 300, Plano, TX 75024

I am a first time attendee

Attendee Name _____ **Email** _____

(Note: Registration confirmations are sent via email ONLY to attendees. Please supply a unique individual email. Copy this form for additional registrants.)

Title/Department _____ **Credit Union** _____

Address _____ **City, State Zip** _____, _____, _____

Telephone (_____) _____ **Emergency Contact/Number** _____ (_____) _____

GRANT ASSISTANCE: Visit the Cornerstone Credit Union Foundation website (www.cscuf.coop) or call (800)953-8283 for educational assistance.

REGISTRANT CANCELLATION POLICY: Substitutions are always welcome. Registration fee refunds (less a \$200 processing fee per person) are granted for cancellations received in writing two weeks prior to the school.

SCHOOL CANCELLATION POLICY: Location with less than twenty (20) registrants two weeks out may be cancelled. In the event of cancellation, all registrants will be notified.

EDUCATION CREDITS: Please contact Janine McBee, CUDE, Sr. Training Director at (800)442-5762 ext. 6634 or email at jmcbee@cornerstoneleague.coop, for information about tracking continuing education units (CEUs), including certifications or recertifications.

TRAINING PROMISE: Cornerstone promises to deliver value-priced training for your credit union with quality content and applicable solutions, presented by industry experts, to enable the success of your credit union.

If you have physical, medical or dietary needs requiring special attention, please contact Training & Events for proper arrangements to be made at (800) 442-5762 ext. 6630.

For questions or more information, please contact Corina Balsells at:
P: (800)442.5762 ext. 6642; **E:** cbalsells@cornerstoneleague.coop