Roth IRAs: Opening, Reporting, Compliance & Conversions

WEBINAR – ON DEMAND WEB LINK – FREE CD ROM

Tuesday, September 29, 2009

12 - 1:30 pm PT
1 - 2:30 pm MT
2 - 3:30 pm CT
3 - 4:30 pm ET

The Roth IRA may be the best retirement product since sliced bread! Learn the key components that contribute to this remarkable product. This program will cover moving designated Roth IRAs to your bank, as well as the new law which allows movement from a 401(k) plan directly to a Roth IRA. Discover the new conversion rule which will take place in 2010. There are many new and exciting developments with Roth IRAs, so don't miss this in-depth look at Roths from start to finish.

Continuing Education: Attendance verification for CE credits provided upon request.

HIGHLIGHTS

- **What is so great about a Roth IRA?**
- **Who is eligible for a Roth IRA?**
- **How do customers get tax free earnings?**
- **What if a customer needs the money before the account is five years old?**
- **What happens when a Roth IRA owner dies?**
- **Can a Roth IRA be rolled over or transferred?**
- **How are Roth IRAs reported?**
- **What is a Roth conversion?**
- **What new conversion rules go into effect in 2010?**
- **How to move a 401(k) plan directly into a Roth IRA**
- **How to move a designated Roth in a retirement plan into a Roth IRA at a bank**

WHO SHOULD ATTEND?

This informative session is directed to customer service representatives, personal bankers, IRA administrators, branch managers, branch administration, trainers, and all personnel that open or administer IRAs.

MEET THE PRESENTER

Deborah Crawford,
gettechnical inc.

CLICK HERE TO LEARN MORE ABOUT YOUR REGISTRATION OPTIONS