IRA Basics

WEBINAR – ON DEMAND WEB LINK – FREE CD ROM

Tuesday, November 3, 2009

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

When a customer wants to open an Individual Retirement Account (IRA), some customer service representatives experience a slight sense of panic. There are so many questions customers might ask about these detailed accounts.

This program will review basic product knowledge and prepare frontline staff for tax time and the onslaught of IRAs. Find out how easy the fundamentals can be! Learn when you can help the customer and when they should be referred to a CPA. Although CSRs can't give tax and legal advice, they should be able to answer basic IRA questions. *This program is designed to build traditional and Roth IRA fundamentals for all frontline employees.*

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

HIGHLIGHTS

- **Review of product features and eligibility**
- **Compare the traditional and Roth IRAs**
- **Learn the difference between rollovers and transfers**
- **Understanding the 70 ½ distributions, premature distributions**
- **What happens at death and different beneficiary options**
- **What you need to know about contracts, paperwork, and compliance**
- **A basic understanding of IRS reporting**

WHO SHOULD ATTEND?

This informative session is well suited for frontline staff, customer service representatives, new account representatives, officers, managers, supervisors, and trainers. All levels of staff will find this seminar to be beneficial and well worth their time!

MEET THE PRESENTER

Deborah L. Crawford,
gettechnical inc.

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