IRA Regulatory Update & Review

WEBINAR – ON DEMAND WEB LINK – FREE CD ROM

Tuesday, January 12, 2010

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

IRAs continue to evolve and change, so it's important to know the regulatory issues, changes, and guidelines that will directly impact your customers during the current tax year and the year ahead. *This webinar is not for beginners;* it is designed for experienced IRA professionals. This fast-paced program will review new and hot IRA issues, including reporting changes/issues that impact both your bank and your customers (e.g. dealing with distributions and the 2009 "skip" on required minimums where the customer creates their own distribution schedule). *Don't miss this complete update for 2009-2010 tax seasons!*

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

HIGHLIGHTS

- **Roth conversion income restrictions lifted in 2010**
- **Non-spouse beneficiaries rollover of Qualified Retirement Plans to individual IRAs**
- **Changes to 5498 reporting instructions**
- **Clarification on contributions of military death gratuities to Coverdell ESAs**
- **New adjustments and numbers for 2010**
- **How to handle an IRA to HSA trustee-to-trustee transfer**
- **Direct rollovers from qualified plans to Roth IRAs**
- **Age 70 ½ and death distributions.**

WHO SHOULD ATTEND?

This informative session is would best suit IRA administrators, IRA coordinators, supervisors, trainers and frontline staff who open IRAs. *It is not designed for beginners.*

MEET THE PRESENTER

Deborah L. Crawford,
gettechnical inc.

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