

# IRA/HSA Review & Update 2011 Tax Year

WEBINAR OR ON-DEMAND WEB LINK  
(LINK INCLUDES FREE CD ROM)

**Tuesday, January 24, 2012**

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

It's tax season again and your bank will have to kick into high gear for this busy time. To prepare, this IRA/HSA review will give you all the new numbers and changes for the 2011-2012 tax season. It is important to know any new regulatory issues, changes, and guidelines that will directly impact your customers for the current tax year and the year ahead. ***This webinar is not for beginners.*** It is for those who work with IRAs on the frontline and those who support the IRA department and management on complicated issues. This program will include a product review, information about how IRAs move and change, and how to manage the compliance and reporting piece of the 2012 tax year. Once you attend this webinar, you will be completely updated and ready for a great tax season.

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



## HIGHLIGHTS

- 2012 numbers for all IRA and HSA products
- Automatic IRA Savers Act introduced
- Reporting changes and highlights
- The charitable payment from 70 ½ customers goes another year
- Death distributions, premature distributions, and 70 ½ distributions
- Product review: Traditional versus Roth
- Moving IRAs from one institution to another
- Qualified Retirement Plans and IRA movement

## **WHO SHOULD ATTEND?**

This informative session is not for beginners. It is designed for IRA coordinators, branch operations staff, trainers, customer service representatives, call centers, and all personnel who deal with IRAs and HSAs.

### **MEET THE PRESENTER**

**Deborah L. Crawford,  
gettechnical inc**



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