

IRA Online Institute

(Deadline is one week prior to start date)

The IRA Online Institute provides comprehensive training on all aspects of IRAs. It covers both traditional and Roth IRA as well as Employer Plans (SEP SIMPLE). The Online Institute is an Institute of Certified Bankers-approved educational program for the Certified IRA Services Professional (CISP) designation. Students should expect to spend 15-20 hours a week completing the readings and assignments. This could vary depending on the student's knowledge of IRAs.

Price	\$1795 Nonmembers / \$1495 Members
Course Length	12 Weeks
Course Credits	AIB: 2.0 ; ICB : 31.75 CISP , CTFA/FP , CRSP
Prerequisites	None
Required Software	Adobe Acrobat Reader; Microsoft Internet Explorer Browser 7.0 or Mozilla Firefox 2.0 or higher
Textbook	All reading materials are provided online. Content and instructor are provided by Ascensus Retirement Services and is the same content used in the Ascensus IRA Institute.
Catalog # / Start Date	3006175 September 6, 2011 3007044 February 27, 2012 3007115 September 4, 2012

Audience

IRA Services Professionals with one to two years experience or if someone is preparing for the CISP exam.

Learning Objectives

After successfully completing this program, you will be able to:

- Administer both traditional and Roth IRAs and SEP and SIMPLE plans.
- Identify eligibility and set-up requirements for all of these plans
- Administer contributions consistent with contribution limits
- Manage rollovers and transfers
- Administer distributions and required minimum distributions
- Describe beneficiary options and facilitate beneficiary transactions
- Manage error resolution, penalties, and reporting on these accounts
- Identify key elements of successful IRA marketing effort

