



IRA Advanced Update & Review

Thursday, February 7, 2019

LEARN THE NEW CONTRIBUTION LIMITS TO EVERY IRA

In order to keep up with the rollercoaster of information being released, attendance at this seminar is a must to obtain the latest and greatest information as well as a deeper review of the more technical areas of IRAs. Too many times “experts” post things on the internet that appear to be vague or many times fabricated regarding retirement account rules and regulations. IRAs are a specialized area that requires expertise.

This program focuses on recent changes, and the content is at the intermediate to advanced level. It is assumed that participants are familiar with the basics of IRAs.

Each participant will receive the complete 275-page Sunwest Training IRA Training and Reference Manual - the “Red Book”, which is constantly updated to reflect the new regulations.

ON THE AGENDA

- What are the legislative updates for 2019?
- How did the Tax Cuts and Jobs Act of 2017 affect IRAs?
- How do you report Qualified Charitable Distributions on the 1099-R?
- What is the three-piece puzzle to solve regarding rollovers and transfers?
- What is a “late rollover” and when can this exception be used?
- What are the 9 – Yes – 9 biggest mistakes we make on beneficiary payouts?
- Are Health Savings Accounts worth offering to our customers?

YEAR 2019 HIGHLIGHTS

- Legislative updates including: IRA Cost of Living Adjustments
- Health Savings Account qualifications and custodial responsibilities
- How to avoid the 6 biggest mistakes of Qualified Plan Rollovers
- IRA Transfers vs. IRA Rollovers – You MUST know the difference!!
- IRA Distributions including Minimum Distribution and Beneficiary Options:
 - Distributions at 70½
 - 9 Red flags of IRA beneficiary payouts

ABOUT THE INSTRUCTOR

Patrice M. Konarik is

president of Sunwest Training Corp. founded 25 years ago and is located in the Texas Hill Country near San Antonio, Texas. With over 30 years’ experience in the financial industry, Patrice has focused her expertise on the retirement areas and is currently providing live training and Webinars on retirement accounts and Health Savings accounts on a nationwide basis. Many state banking associations and other organizations use her as their main source for training on these complicated topics.



WHO SHOULD ATTEND

- IRA personnel in New Accounts, CDs, Trust, Investments & Savings



WHEN

Thursday, February 7, 2019
9:00 a.m. – 4:30 p.m.



WHERE

Arkansas Bankers Association
1220 W. 3rd Street | Little Rock
501-376-3741

Arkansas Bankers Association Professional Development Department

1220 West Third Street | Little Rock, Arkansas 72201 | (501) 376-3741 | www.arkbankers.org

IRA ADVANCED UPDATE & REVIEW

February 7, 2019

Arkansas Bankers Association

REGISTRATION INFORMATION

Registrant #1 Name _____

Title _____

Email _____

Registrant #2 Name _____

Title _____

Email _____

Registrant #3 Name _____

Title _____

Email _____

Bank/Company _____

Address _____

City _____ State _____ Zip _____

Billing Contact _____

Phone _____

PAYMENT INFORMATION

Charge my: Mastercard  Visa 

Account Number _____

Name on Card _____

Expiration Date _____ CSC Number _____

(3-digit security code on back of your card)

If you would prefer to give us your credit card information over the phone, please call the ABA Professional Development Department at (501) 376-3741.

Note: Non-Members must pay with credit card or check prior to the event.

Email: brenda.scarbrough@arkbankers.org
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Fax: (501) 376-9243

Mail: Check Payable to
Arkansas Bankers Association
Professional Development Department
1220 West Third Street
Little Rock, AR 72201

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REGISTRATION FEES

ABA Members:

Early Registration Price: \$325; After January 10: \$375

Non-Members:

Early Registration Price: \$650; After January 10: \$750

Registration fees include continental breakfast, instruction, materials, refreshment breaks, and lunch. To receive a registration confirmation, please provide an e-mail address on the registration form. If you do not receive a confirmation within 48 hours, please check with the ABA.

HOTEL INFORMATION

This seminar will be held at the Arkansas Bankers Association. Should you need a hotel room reservation, a Locally Negotiated Rate has been reserved for your convenience at the following hotels:

Holiday Inn Presidential | (501) 375-2100

Group Rate: \$97 | Group Code: IL64N

Hilton Garden Inn | (501) 244-0044

Group Rate: \$119 | Group Code: N3197385

CANCELLATION

Register before January 10 if possible. Full registration fees will be refunded if a cancellation is received before January 24. No refunds will be given for cancellations made after January 24. Substitutions are welcome and encouraged. All cancellations and substitutions must be submitted in written format prior to the event.

MORE INFORMATION

- Registration will begin at 8:30 a.m. on February 7.
- Dress for the seminar is business casual. To ensure your comfort, please bring a jacket or sweater.
- If you have any special dietary requests, please contact the ABA Professional Development Department at (501) 376-3741.
- By attending an ABA event, you are consenting to the ABA taking and using your photograph and name for use in its marketing or promotional materials, news publications or website.

CONTINUING EDUCATION



Attendants qualify for 6 Continuing Professional Education (CPE) Credits in Specialized Knowledge & Applications in group-live training. No advance preparation is required.

The Arkansas Bankers Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

INCLEMENT WEATHER POLICY

Cancellations due to inclement weather are refundable. If you have questions concerning the status of an ABA program due to inclement weather, please call (501) 376-3741 or visit www.arkbankers.org for further information.