

IN-PERSON SEMINAR

IRAs: Advanced Issues

Thanks to a flurry of legislative and regulatory developments, IRA providers nationwide are fighting uphill battles as they strive to comply with numerous recent changes to the laws governing IRAs. These changes affect virtually every facet of IRA administration and servicing including eligibility, funding, withholding, reporting, required minimum distributions and inherited IRA distributions. As the IRS continues to issue guidance concerning the implementation of these changes, it is imperative that IRA providers stay abreast of these developments—both to help ensure internal compliance as well as to provide top-notch customer service to IRA clients.

By keeping abreast of these changes, IRA providers will be well positioned to better understand and implement the ongoing changes that are being made to the provider's systems, forms, and procedures and be able to identify when additional steps may be warranted to help ensure ongoing compliance.

The bottom line? Numerous IRA rules have changed, new forms have been introduced, IRA software is being updated and there are more changes on the horizon. Keeping abreast of these changes—while not always easy—is crucial to running a compliant IRA program.

We'll get into the nitty gritty of the new distribution regulations, exploring—in depth—how these new rules affect both IRA owners and IRA beneficiaries. After thoroughly dissecting the new rules and their impact on IRA owners and beneficiaries, we'll discuss concrete steps your financial organization can take to help ensure ongoing compliance, while also providing top-notch customer service.

ABOUT THE INSTRUCTOR



Jonathan Yahn, JD, CPC, is the Senior ERISA Counsel. His experience involves a mercifully short time in private practice and a stint as a contracts and compliance manager in government procurement. Throughout this mix of professional work, Jonathan has maintained his commitment to clear, concise, and engaging communication. He is a graduate of Bethel University and Hamline Mitchell Law School—both in St. Paul, Minnesota—Jonathan's work at Convergent Retirement Plan Solutions, LLC builds on his nearly 30 years in the retirement plan industry. He has contributed to numerous industry publications over the years and shares his experience through his presentations, writing, and consulting work.

A close-up of a hand-drawn table on a notepad. The table has two columns: 'Roth IRA' and 'Traditional IRA'. Under 'Roth IRA', there is a minus sign (-). Under 'Traditional IRA', there is a plus sign (+). The notepad is on a wooden desk with some papers and a pen nearby.

Roth IRA	Traditional IRA
-	+

WHEN

April 25, 2024
9:00 a.m. - 4:00 p.m.

WHERE

Arkansas Bankers Association
1220 W. Third Street
Little Rock, AR 72201

AGENDA HIGHLIGHTS

- Legislative and Regulatory Round Up (more in depth)
- Tackling Inherited IRAs
- Qualified Charitable Distributions (QCDs)
- Portability Deep-Dive
- Roth IRA Conversions
- Processing Traditional, Roth, and SIMPLE IRA Distribution Requests



Arkansas Bankers Association | Professional Development Department

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

REGISTRATION FEES

ABA Members:

Early Registration Price: \$340; After March 27: \$390

Non-Members:

Early Registration Price: \$680; After March 27: \$780

HOTEL INFORMATION

This event will be held at the Arkansas Bankers Association. Should you need a hotel room reservation, a Local Negotiated Rate (LNR) has been reserved for your convenience at the following hotels. The LNR is based on hotel availability, and you are responsible for all hotel room charges.

Hilton Garden Inn Downtown | (501) 244-0044
Group Rate: \$139 | Corporate Account Code: 3197385

Downtown Marriott Little Rock | (501) 906-4000
Group Rate: \$169 | Group Code: A5698

CANCELLATION

Full registration fees will be refunded if a cancellation is received before April 11. No refunds will be given for cancellations made after April 11. All cancellations must be submitted in written format prior to the event.

MORE INFORMATION

- Registration will begin at 8:30 a.m. on April 25
- 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.

IRAS: ADVANCED ISSUES

APRIL 25, 2024

Bank/Company Name _____ Phone _____

Registrant Name _____ Title _____ E-mail _____

Registrant Name _____ Title _____ E-mail _____

Address _____ City _____ State _____ Zip _____

Registration Contact _____ Phone _____ E-mail _____

PAYMENT INFORMATION

Charge my: Mastercard  Visa  American Express  Discover 

Account Number _____

Name on Card _____

Expiration Date _____ CSC Number _____

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

Billing Zip Code _____

If you would prefer to pay via credit card over the phone, please call the ABA at (501) 376-3741. Please do not email your credit card information.

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

Email: abigail.johnson@arkbankers.org

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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