# **B**ANKÉŘS

## **IRA Seminars • Spring 2019**

March 19 & 20 – Courtyard by Marriott, Bismarck ND March 21 & 22 – Holiday Inn, Fargo ND



#### **IRA Essentials**

March 19 – Courtyard by Marriott, Bismarck March 21 – Holiday Inn, Fargo

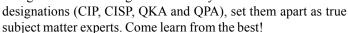
#### **Advanced IRAs**

March 20 – Courtyard by Marriott, Bismarck March 22 – Holiday Inn, Fargo

#### **About the Speakers**

These IRA seminars will be delivered by Ascensus instructors who are recognized as some of the leading retirement plan experts in the industry.

The instructors have a combined 138 years of Ascensus experience. This, along with their recognized industry





You may want to attend one or both of these seminars if you would like to learn basic rules that govern Traditional and Roth IRAs, need a general refresher on IRA rules, or have a working knowledge of basic IRA operations and want to expand upon that knowledge.

#### Schedule

8:00-8:30 a.m. Registration & Continental Breakfast

8:30-11:45 a.m. **Program** 

11:45 a.m.-1:00 p.m. NDBA Hosted Lunch

1:00-4:15 p.m. **Program** 4:15 p.m. Adjourn

#### **Hotel Information**

A block of rooms has been reserved at each hotel. Room rates and deadlines are indicated below. Please call the hotels directly and indicate that you are with "ND Bankers."

#### Courtyard by Marriott

3319 N 14th St Bismarck ND 58503 Phone: 701-223-6667

Room rate: \$139 Deadline to reserve rooms: Feb. 18

#### **Holiday Inn**

3803 13th Ave S Fargo ND 58103 Phone: 701-282-2700

Room rates: \$102 Deadline to reserve rooms: Feb. 19

*Questions?* Please call NDBA's SVP of Education Dorothy Lick at 701.223.5303.

## NDBA Registration Form

#### **Registration Information**

Price listed is per person, per program. Register early and save!

Advance After 2/15

Registration \$225 \$245

(NDBA seminar price includes lunch.)

#### Send form with payment to:

North Dakota Bankers Association Attn: Registration PO Box 1438 Bismarck ND 58502-1438

Or Email to ndba@ndba.com



**Questions?**Call 701.223.5303.

IRA Spring Seminars • March 19 - 22, 2019			
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#### **IRA Essentials**

IRA Essentials gives attendees a solid foundation of IRA knowledge. Exercises are included throughout the day to help participants apply information to job-related situations. Attendees will leave this session able to work with IRA owners and process basic IRA transactions with confidence. This is a beginner's session; no previous IRA knowledge is assumed. Attendees should bring a hand-held calculator.

#### **Course Topics**

- Introduction and Establishing IRAs
- IRA Funding
- IRA Distributions
- IRA Portability

#### Who Should Attend?

You should attend this seminar if you need to learn the basics of Traditional and Roth IRAs or if you want an updated, general refresher on IRA rules.

#### **Advanced IRAs**

Advanced IRAs builds on the attendees' basic IRA knowledge to address some of the more complex IRA issues their financial organizations may handle. This is an advanced session; previous IRA knowledge is assumed. The instructor uses real-world exercises to help participants apply information to job-related situations.

#### **Course Topics**

- IRA Update
- Required Minimum Distributions
- Beneficiary Options
- Advanced Portability
- Roth IRA Conversion Contributions
- Withholding and Getting It Right

#### Who Should Attend?

IRA administrators, personal bankers and customer member personnel who have a working knowledge of basic IRA operations and are looking to expand their IRA expertise and provide enhanced customer service; financial professionals who recognize IRAs play an integral role in retirement planning; compliance specialists with procedural oversight of IRA policies and practices; and support personnel responsible for promotional materials.

#### **Schedule**

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#### **Continuing Education Credits**

These IRA seminars may be eligible for insurance continuing education credits. Please call NDBA for details.



For more information, please call NDBA's SVP of Education Dorothy Lick at 701.223.5303.

