

# IRA Basics

## A web-based seminar

Thursday, September 30th, 2010,  
9:00 AM–11:00 AM Mountain



WYOMING BANKERS ASSOCIATION  
200 East 8<sup>th</sup> Ave.  
P.O. Box 2190  
Cheyenne, Wyoming 82003  
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### Program Content:

You have finally received the promotion you've been dreaming about – IRA Coordinator! Now what do you do? Were you able to get even a little bit of training before the last Guru left the bank - or are you "on your own"? Because of their extreme complexity, IRAs are a very difficult product to learn "on the job." In short order, personnel begin to dislike this account because of the feeling of uncertainty that occurs when an accountholder asks unfamiliar questions. The goal of this basic Webinar is to start at the beginning of "What is an IRA?" Who can have an IRA? How much can they contribute? All areas will be thoroughly discussed with emphasis on the responsibility of the financial institution vs. the responsibility shifting to the accountholder.

### Covered Topics:

- Basic Forms Required To Open, Close, Move and Maintain IRAs (have your own forms - including application, contribution and distribution forms - available during the webinar)
- Qualifications, Contribution Limits and Deadlines for:
  - Traditional IRA and Roth IRAs
  - Conversion Roth including New TIPRA regulations
- Moving money from a Qualified Employer Plan to an IRA
- Moving IRA Funds - IRA Rollover vs. IRA Transfer

Plus question and answer sessions throughout this presentation.

### Presenter:

Patrice M. Konarik, CFP is president and founder of Sunwest Training Corp. located near San Antonio, TX. She has over 25 years experience in the banking industry specializing in Deposit Accounts and IRAs, and is currently providing live and Webinar training in these areas on a nationwide basis. Patrice earned her BS in Management from Binghamton University in New York and has been a Certified Financial Planner for over 15 years.

### Who Should Attend:

New Account Representatives, Certificate of Deposit Personnel, Savings Counselors, Accountholder Service Representatives, Investment and Trust Personnel who are NEWLY involved in the opening, selling, marketing, or administration of IRAs. Any officer/manager who "oversees" the IRA department and may be responsible for answering IRA accountholders questions or concerns but does not actually open IRA accounts. Experienced IRA Personnel who like a review of the basics and forms.

### Registration Fee:

**\$255 per web connection, per session.** Additional branches will receive a reduced rate of \$150!

### Cancellation Policy:

Refunds will be given only for cancellations received in written form 3 business days prior to the program. If your bank is unable to participate after registering, you can also select to receive an audio CD plus a special password to see the information online of the seminar at no additional charge.

*If you are unable to attend the webinar but would like to have this information for training purposes, you may also purchase an audio CD, handout materials and a password to view the information online.*

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*\*Please include an email address as this is how your webinar materials will be delivered to you.*

### Please check one of the following:

- |   |       |
|---|-------|
| <input type="checkbox"/> Web connection                             | \$255 |
| <input type="checkbox"/> Additional connection for a branch         | \$150 |
| <input type="checkbox"/> Only audio CD and materials                | \$255 |
| <input type="checkbox"/> Web connection and audio CD plus materials | \$375 |

### Ways to Register:

ONLINE: [www.bankwebinars.com](http://www.bankwebinars.com)

FAX: (800) 831-3776

PHONE: (800) 831-0678

MAIL: TTS, PO Box 310, Waunakee, WI 53597

**Please Do Not fax registrations to the Wyoming Bankers Association**

### Method of Payment:

- Please invoice our bank  
 Check made payable to TTS  
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For assistance, please call Cheryl Johnston, (307)638-5008