



CENTER FOR FINANCIAL TRAINING

AND



COLORADO THE BANKERS ASSOCIATION

PROUDLY PRESENT:

WESTERN STATES

# TWO-DAY IRA WORKSHOP A COMPREHENSIVE IRA COURSE FROM A TO Z

Facilitated By:



**Wednesday & Thursday  
June 8 & 9, 2011**

**8:30 a.m. to 4:15 p.m.**

**Sterner Training Center  
1009 Grant Street  
Denver, Colorado**

**\$355\* Member Early  
\$380\* Member Regular**  
Member of  
CFTWS or Ascensus

**\$710\* Non-Member Early  
\$735\* Non-Member Regular**

### Who Should Attend?

You should attend this workshop to become more comfortable with the IRA (Traditional and Roth), Coverdell ESA and HSA rules while ensuring that your financial organization is in compliance! This workshop is essential for individuals who are new to IRAs and need an understanding of the basic IRA (Traditional and Roth), Coverdell ESA and HSA rules. If you are looking for an update, this two-day IRA Workshop will slow be very beneficial as a general refresher, keeping you up-to-date on the latest changes.

### ICB-CISP

To be successful in the retirement plans industry, IRA professionals must keep up to date on the latest IRA rules. This educational program is designed to provide the most current IRA information to attendees—whether they are new to IRAs or are experienced IRA professionals. This two-day workshop provides a hands-on, interactive learning opportunity that shows attendees how to apply their IRA knowledge in real-life situations.

### OBJECTIVES:

At the conclusion of this workshop, participants should be able to:

- ◆ Describe IRA opening documents
- ◆ Determine IRA contribution eligibility
- ◆ Identify the IRA contribution limits
- ◆ Explain the Traditional IRA deductibility rules
- ◆ Recall IRA reporting requirements
- ◆ Understand how to transfer, rollover, convert, and recharacterize IRA assets
- ◆ Explain the new conversion and rollover rules
- ◆ Calculate required minimum distributions
- ◆ Determine beneficiary options
- ◆ Understand the new rollover options for non-spouse beneficiaries
- ◆ Identify IRA transaction forms

### What's Different About This Workshop? Plenty!

This workshop is fast-paced and fun. You will participate through hands-on application, peer discussions and activities that bring the information alive. Plan to roll up your sleeves and work through every aspect of your IRA operations.

**Ascensus** seminars are delivered by a group of highly trained retirement plan consultants who thoroughly understand the laws affecting IRAs. These consultants have daily contact with financial organizations that offer IRA products, and specialize in providing practical solutions to the most complex IRA issues.

### SPECIAL OFFER FROM CFTWS!

Register one person to attend this workshop at the advertised tuition price (early or regular), and receive a 10% discount on any additional registrants!

## REGISTRATION FORM (Course #N8220A1S11-CBA)

FAX: 303-629-1591 ♦ MAIL: CFTWS, 1009 Grant Street, Suite 102, Denver, CO 80203 ♦ ONLINE: www.CFTWS.org

Name \_\_\_\_\_ Title \_\_\_\_\_ E-Mail \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_ E-Mail \_\_\_\_\_

Name \_\_\_\_\_ Title \_\_\_\_\_ E-Mail \_\_\_\_\_

Company \_\_\_\_\_

Street Address \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

\*Authorization for Billing \_\_\_\_\_

Tuition Payment Option:  \*Bill Organization  Check (payable to CFTWS)  Visa  M/C

Card No. \_\_\_\_\_ Exp. Date \_\_\_\_\_

Cardholder's Name \_\_\_\_\_ Signature \_\_\_\_\_

### \*REGISTRATION GUIDELINE:

Register by **MAY 25, 2011** to receive the "Early" tuition rate above. NO REFUNDS WILL BE GIVEN AFTER MAY 25th, ALTHOUGH A SUBSTITUTE MAY ATTEND. Cancellations received in writing prior to May 25th will be subject to a \$75 withdrawal fee.