

Registration Request - IRA Fundamentals Seminar

Please check location you wish to attend:

- Cape Girardeau Columbia
- Springfield Kansas City

Bill to _____

Bank _____

Address _____

City/State/Zip _____

Phone _____

Fax _____

Names of Attendees _____

Name _____

Title _____

E-Mail _____

Name _____

Title _____

E-Mail _____

Method of Payment _____

Member Fee \$225 # _____ \$ _____

Each Additional..... \$205 # _____ \$ _____

Non-member Fee \$400 # _____ \$ _____

Each Additional..... \$380 # _____ \$ _____

Total amount due: \$ _____

Check enclosed, payable to **MBA**

Invoice the bank.

Credit Card Payment* **(Please type.)**

VISA **MasterCard**

Exp. Date _____

No. _____

Type Name _____

Signature _____

**Only VISA and MasterCard are accepted.*



**Missouri Bankers Association
P.O. Box 57
Jefferson City, MO 65102**

RETURN SERVICE REQUESTED

Mailing Address Information

We strive to keep our mailing list as up-to-date and accurate as possible. If the addressee listed on this brochure is no longer employed at your bank or if the mailing address is incorrect, please send an email to database@mobankers.com.

Please route this information to his/her replacement, department manager, or training director. We appreciate your assistance!



IRA Fundamentals:

A Seminar for Individuals Who

Need an IRA Refresher or

Individuals New to IRAs



Seminar Overview

Our IRA Fundamentals seminar is one of our most popular seminars. Each year, IRA professionals attend this seminar to enhance their knowledge of Traditional and Roth IRAs—including the latest information on IRA portability, beneficiary, and reporting rules. Our experienced instructor, Mike Nelson, uses classroom instruction and real-life examples to create an ideal learning environment for attendees. This seminar is designed to teach IRA fundamentals to individuals who are new to the retirement industry or who need a general IRA refresher. Although the IRA Fundamentals seminar is an introductory course, our instructors will assist attendees with more advanced questions.

Course Topics

Roth and Traditional IRA Plan Establishment

- ◆ Documentation requirements
- ◆ Plan agreements and disclosure statements

Contributions

- ◆ Eligibility requirements
- ◆ Distinction between eligibility and deductibility

Moving IRA Assets

- ◆ Rollovers, transfers, conversions, and recharacterizations
- ◆ Transaction forms
- ◆ Step-by-step procedures

Roth and Traditional IRA Distributions

- ◆ Required minimum distributions (RMDs)
- ◆ Roth IRA distribution rules
- ◆ Beneficiary distributions

Required Reporting

- ◆ Importance of accurately completing transaction forms
- ◆ Reporting deadlines

Course Benefits

After attending this seminar, you will

- ◆ understand the IRA establishment process,
- ◆ know how to select and complete appropriate forms for IRA transactions,
- ◆ recall the contribution limits for Traditional and

Roth IRAs,

- ◆ realize the role you should (and should not) play when accepting IRA contributions,
- ◆ understand how to process IRA distributions,
- ◆ recognize the types of reports you must submit to the IRA holder and to the IRS, and
- ◆ know the pertinent information you must include on required reports.

Who Should Attend

You should attend this seminar if you

- need to learn the basic rules that govern Traditional and Roth IRAs, or
- need an updated, general refresher on IRA rules.

Continuing Education

Submitted for continuing education credits from the Missouri Division of Insurance.

Dates & Locations

Cape Girardeau **September 28, 2010**
Drury Lodge 573-334-7151
104 S. Vantage (I-55 & Route K)
Cape Girardeau, Mo.

Columbia **September 29, 2010**
Courtyard by Marriott 573-443-8000
3301 LeMone Industrial Blvd (Hwy 63 & AC exit)
Columbia, Mo.

Springfield **September 30, 2010**
Holiday Inn North 417-865-8600
2720 North Glenstone
Springfield, Mo.

Kansas City **October 1, 2010**
Courtyard by Marriott 816-891-7500
7901 NW Tiffany Springs Pkwy
Kansas City, Mo.

Schedule

8:00 a.m. Registration Check-In
8:30 a.m. Seminar Begins
Noon Lunch
12:45 p.m. Seminar resumes
3:30 p.m. Adjournment

About the Instructor

Mike Nelson has been MBA's IRA instructor for the past nine years. Mike not only instructs, he listens and responds to special needs, and involves his audience in an effective group learning experience. You are encouraged to participate by asking questions or sharing concerns throughout the program.

Handbooks are provided by Ascensus an endorsed vendor of MBA Bankers Service Corporation.

Registration Information

Fees: Member \$225 per person
Each Additional \$205 per person
Non-member \$400 per person
Each Additional \$380 per person

The cost of meals included in this registration fee for this meeting is \$19.00. This information is provided for your bank's tax records, in keeping with the IRS 50 percent deductible provisions under Section 274(n) of the Internal Revenue Code.

Cancellation/Refunds: Full refunds will be granted for cancellations received by MBA at least 10 days prior to the seminar date. After that date, an administrative fee of \$10 per canceled registration will be retained. Cancellations will not be accepted four days prior to the seminar. Substitutions are always permitted.

Disabilities

Do you have any disabilities that require special assistance? If yes, attach a brief letter explaining how we may best accommodate your needs, or call Cindy Foltz at 573-636-8151.

Four Ways to Register

By Fax Complete and fax to (573) 634-2754

By Phone Call the MBA at (573) 636-8151

By Mail Mail the completed form and registration fees to:
Missouri Bankers Association
P.O. Box 57
Jefferson City, MO 65102

Online www.mobankers.com