


2010 IRA School

ON-LOCATION SEMINAR 	Date:	Tuesday, August 10 - Wednesday, August 11, 2010
	Time:	9 a.m. – 4 p.m. (Registration begins at 8:30 a.m. each day)
	Locations:	Hilton Hotel, 1001 East County Line Rd., Jackson, MS (601) 957-2800
	Seminar Description:	<ul style="list-style-type: none"> • Do you dread IRA season? • Have you ever been asked an IRA question and wanted to crawl under your desk? • Were you told the IRA Specialist position is a promotion??? <p>If the answer to these questions is a resounding “Yes”, this is the seminar for you.</p> <p>We will begin the journey with an overview of the “Top 20 Terms of IRAs”. If you are looking for a seminar that will answer all your simple and complex questions, this one fits the bill. This in-depth seminar will provide the new IRA banker and supervisor with a complete understanding of all areas of the IRA account, as well as, an IRA review of the regulation changes and clarifications. Each participant will receive the 275-page Sunwest Training IRA Training and Reference Manual.</p>
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 slower pace workshop to cover all the new changes in a comprehensive manner.	
Program Highlights:	<p style="text-align: center;">Day 1: IRA Basic Issues</p> <ul style="list-style-type: none"> * IRA Terminology * Explanation of IRA Forms (not forms specific – please bring your own forms including Application, Contribution form, Distribution, Rollover Review or Certification and any other commonly used forms) * Beneficiary Designations including Primary and Contingent, Trusts and Estates * Qualifications, Contribution Limits and other regulations for a: <ul style="list-style-type: none"> - Traditional IRA - Roth and Conversion Roth - Coverdell Education Savings Account - SEP IRAs <p style="text-align: center;">Day 2: IRA Intermediate Issues</p> <ul style="list-style-type: none"> * Health Savings Account * Qualified Plan Rollovers to a Traditional or Roth IRA <ul style="list-style-type: none"> - Direct vs. Indirect * IRA Rollovers and Transfers * Distributions <ul style="list-style-type: none"> - Withdrawals of Excess Contributions - Before age 59 ½ (including changes to the section 72(t) exception) - After age 70 ½ - Death Payments to Beneficiaries * Overview and Explanation of IRS Reporting Requirements * Plus any updated changes to IRAs proposed and enacted 	
Speaker:	Patrice M. Konarik, CFP® , is president and founder of Sunwest Training Corp. located near San Antonio, Texas. With over 25 years experience in the financial industry, Patrice has focused her expertise on the retirement and new account areas and is currently providing training in 23 states. She has a BS from New York’s Binghamton University and earned her Certified Financial Planner™ designation in 1990. Patrice brings the information to life with her humorous training style, an in-depth knowledge, and an unlimited supply of "true life" examples.	
Registration Fee:	The registration fee includes continental breakfast, breaks, training material, certificate of attendance and lunch. Members: \$480 first registrant both days and \$450 additional registrant from the same bank both days (\$240 & \$225 per day, respectively) Non-Members: \$960	
Cancellation Policy:	Full registration fees will be refunded if a cancellation is received on or before August 3, 2010. After that date, a \$50 processing fee will be retained. No refunds will be granted for cancellations made the day of the seminar. Substitutions are welcome at no extra charge.	
Dress:	Casual dress is recommended. To ensure your comfort, please bring a jacket or sweater.	



**SEMINAR REGISTRATION
FORM**

(For Office Use Only)

Date Processed: _____

Seminar Code: _____

IRA SCHOOL, AUGUST 10-11, 2010

Seminar Name: _____ Location: _____

Bank Name: _____

Street Address: _____ City, State, ZIP: _____

Phone: _____ Fax: _____

Registrant Name: _____ Email (if N/A, fax #): _____

Registrant Name: _____ Email (if N/A, fax #): _____

Registrant Name: _____ Email (if N/A, fax #): _____

Each individual registrant will receive a confirmation of registration via email or fax. Please contact the MBA if you do not receive a confirmation within 48 hours.

Please register by FAX to Lori at 601-355-6461 or mail to MBA, PO Box 37, Jackson MS 39205.