


2010 IRAs: THE BASICS

	Date:	Monday, March 29, 2010
	Time:	8:30 a.m. Registration; 9:00-4:30 Program
	Location:	Hilton Hotel, 1001 E. County Line Road, Jackson, MS 601-957-2800
	Seminar Description:	You have finally gotten 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 all day workshop 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.
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.	
What You Will Learn:	<p>If you have been looking for a seminar that will answer all your simple and complex questions, this one fits the bill. This comprehensive A-Z seminar will provide the new IRA banker and supervisor with a complete understanding of all areas of the IRA account, as well as the newly enacted regulations. Each participant will receive a completely updated 275-page IRA Training and Reference Manual.</p> <p style="text-align: center;">Year 2010 HIGHLIGHTS:</p> <ul style="list-style-type: none"> * IRA Terminology in simple format * Explanation of IRA Forms including Beneficiary Designations (bring your own forms) * Qualifications, contribution limits and deadlines for a: <ul style="list-style-type: none"> - Traditional IRA - Regular and Conversion Roth - Coverdell Education Savings Account - Simplified Employee Pension Plan (SEP IRA) * Qualified Plan Rollovers to Traditional and Roth IRAs <ul style="list-style-type: none"> - Direct vs. Indirect * Moving IRA Funds <ul style="list-style-type: none"> - Rollovers vs. Transfers * Distributions <ul style="list-style-type: none"> - Basic Distribution Information <p>You are encouraged to bring a sample of the IRA Organizer or Simplifier, contribution and distribution forms your financial institution is currently using for your review during the session.</p>	
Seminar Speaker:	<p>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 teaching style, an in-depth knowledge of the subject matter and an unlimited supply of "true life" examples.</p>	
What are the costs?	<p>\$245 for first registrant \$225 for each additional registrant \$490 for non-members</p>	

Mississippi Bankers Association presents

2010 IRAs: THE BASICS REGISTRATION FORM

Bank Name: _____

Bank Address: _____

City, State, ZIP: _____

Phone: _____ **Fax:** _____

Registrant 1 Name: _____ **City (for name badge):** _____

E-mail Address: _____

Registrant 2 Name: _____ **City (for name badge):** _____

E-mail Address: _____

Registrant 3 Name: _____ **City (for name badge):** _____

E-mail Address: _____

Please add additional registrants to the bottom of this page.

Fee to be Billed: ___ \$245 First Registrant ___ \$225 Each Additional Registrant ___ \$490 Non-Member

Please fax in your registration and the MBA will invoice you. Each individual registrant will receive a confirmation of registration via email or fax. Please contact the MBA at (601) 948-6366 if you do not receive a confirmation within 48 hours.

Please register by FAX to 601-355-6461, attn: Lori Richardson

Or mail your registration to: Mississippi Bankers Association, PO Box 37, Jackson MS 39205