KANSAS BANKERS ASSOCIATION

2021 Winter IRA

While it may take years to build a confidence level where you can answer almost any IRA question thrown your way, the goal of this program is to raise your comfort level and update you with the changes whether you are a rookie or a seasoned veteran. You will also receive your favorite "tool" – the 275-page newly revised 2019-2020 Sunwest Training Corp's IRA Training and Reference Manual - which is not only full of easy-to-follow IRA information, but also lots of "Cheat Sheets" and "Quick Reference Tools" to get you through your day-to-day tasks of dealing with your IRA customers.

The SECURE Act was signed into law under the Appropriations Act on December 20, 2019. Most of the provisions were in effect on January 1, 2020. These are the most substantial changes we've had to IRAs in almost 15 years. The CARES Act was passed 3 months later further making rules and regulations changes to IRAs. In this IRA Update, we will summarize the changes and then actually get into the nitty gritty of new distribution regulations to owners and beneficiaries.

Who should purchase?

Everyone even remotely involved in IRAs at your financial institution including: New Account Representatives, Certificate of Deposit Personnel, Savings Counselors, Accountholder Service Representatives, Investment and Trust Personnel who need this update and are 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.

Pricing for Manual: (OnDemand not Available):

____ **Member:** $80

____ **Non-Member:** $200

Includes download of Call Report Update & Review manual. Please email completed form to Nicole Ortiz at nortiz@ksbankers.com or faxt to 785-272-8392.

Name:____________________

Bank:____________________

Address:____________________

City, Zip:____________________

Email:____________________

Topics To Be Covered:

- IRA Terminology in simple format – Top 20 terms of IRA Review
- Qualifications, deadlines and contribution limits – including new 2020 Cost of Living Adjustments and SECURE Act changes for a Traditional IRA
- Regular Roth IRA and Conversion Roth
- Qualified Plan Rollovers to Traditional and Roth IRAs - Direct vs. Indirect
- Moving IRA Funds: Rollovers vs. Transfers – Understanding the difference between Rollovers and Transfers
- and much more!

Program Presenter

PATRICE M. KONARIK

Patrice M. Konarik is president of Sunwest Training Corp. founded over 25 years ago and is located in the Texas Hill Country near San Antonio, Texas. With over 35 years in the financial industry, Patrice has focused her expertise on the retirement account area and is currently providing live training and Webinars on IRAs and Health Savings Accounts on a nationwide basis.