KANSAS BANKERS ASSOCIATION

ADVANCED IRAS

NOVEMBER 19, 2026 - VIRTUAL

Advanced IRAs builds on the attendees' basic IRA knowledge to address some of the more complex IRA issues that their financial organizations may handle. This is an advanced session; previous IRA knowledge is assumed. The instructor uses real-world exercises to help participants apply information to job-related situations.

COURSE TOPICS WILL INCLUDE

Origins of Compliance – 75 minutes
- Describe auditing procedures and the recommended corrections
- Recognize and prevent common compliance errors
- Identify the penalties associated with the three main areas of compliance

Required Minimum Distributions – 45 minutes
- Calculate a required minimum distribution (RMD)
- Discuss the RMD rules
- Explain the RMD reporting requirements

Beneficiary Options – 165 minutes
- Describe beneficiary distribution options when an IRA owner dies on or after January 1, 2020
- Recognize the differences for the various beneficiary types

Handling Complex IRA Death Claims – 75 minutes
- Identify complex beneficiary issues
- Explain the procedures for handling complex beneficiary issues

WHO SHOULD ATTEND?

- IRA administrator personal bankers, or member services personnel who has a working knowledge of basic IRA operations and are looking to expand your expertise and provide enhanced customer service;
- a financial professional who recognizes that IRAs play an integral role in retirement planning;
- a compliance specialist with procedural oversight of IRA policies and practices;
- a support personnel responsible for promotional materials that describe the services provided by your financial organization

PRESENTED BY
ASCENSUS®

PRESENTER

Mary Hopkins has been a Consultant within the ERISA Department at Ascensus since 2021. In her position, Mary assists financial organizations on compliance issues through Ascensus' 800 Consulting Service and compliance reviews. She also instructs webinars and Ascensus sponsored seminars and contributes to technical reviews of forms, documents, and publications.

Mary earned the Certified IRA Services Professional (CISP) designation through the Institute of Certified Bankers (ICB) in 2007 and the Certified Health Savings Professional (CHSP) designation in 2023. She has over 19 years of experience with qualified retirement plans and IRAs—including Traditional and Roth IRAs, health savings accounts, Coverdell education savings accounts, SEP and SIMPLE IRA plans.

2026 FALL ADVANCED IRA TRAINING

November 19, 2026, Virtual

PROGRAM AGENDA

Session: 9:00 a.m. – 4:00 p.m.
Lunch: 12:00 p.m. – 1:00 p.m.

ASSET SIZE	ADVANCED (LIVE)
$25 mil & under	___ $370
$26 mil – $100 mil	___ $475
$101 mil – $250 mil	___ $580
$251 mil – $400 mil	___ $790
$401 mil – $750 mil	___ $1,000
$751 mil – $1 bil	___ $1,315
Over $1 billion	___ $1,630
Strategic Partners	___ $1,000
Non-Members	___ $3,255

We understand circumstances arise requiring cancellation. Cancel up to five business days before the session and your registration will be refunded. There is no limit to the number of employees that can attend the virtual session from your institution. If more than two people from your bank are attending, please email education@ksbankers.com.

A 30-day replay will be available for all participants.
Program approved for 6.5 Kansas CLE credits.

Name: ____

Bank Location: ______________________ E-mail: ______________________

Name: ____

Bank Location: ______________________ E-mail: ______________________

Name: ____

Bank Location: ______________________ E-mail: ______________________

Bank: ____

Total Enclosed: $ ______________________ Total Attending: ______________________

Address: ______________________ ______________________

City: ______________________ State: ______________ Zip: ______________

Three ways to register:

1. Complete and mail the registration form with a check.
2. Email the registration form to education@ksbankers.com, followed by payment via check by mail or credit card over the phone.
3. Register online using a credit card at www.ksbankers.com.

Kansas Bankers Association - Education & Conferences
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