KANSAS BANKERS ASSOCIATION

ADVANCED IRAS

FEBRUARY 18, 2027 - 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

IRA Amendments

- Identify the differences between IRS model documents and prototypes
- Recognize required components of an IRA document
- Describe IRA amendment procedures and deadlines

Required Minimum Distributions

- Calculate a required minimum distribution (RMD)
- Discuss the RMD rules
- Explain the RMD reporting requirements

Beneficiary Options

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

IRA Beneficiary Workshop – Applying the Options

- Determine the distriutions options available to beneficiaries under the current rules and regulations
- Apply existing guidance to different beneficiary case studies
- Analyze complex beneficiary scenarios

Handling Complex IRA Death Claims

- 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;
- Financial professionals who recognizes that IRAs play an integral role in retirement planning;
- Compliance specialists with procedural oversight of IRA policies and practices;
- Support personnel responsible for promotional materials that describe the services provided by your financial organization

PRESENTER

This webinar and materials will be presented by Ascensus.

PRESENTED BY ASCENSUS®

2027 WINTER ADVANCED IRA TRAINING

February 18, 2027, 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	___ $380
$26 mil – $100 mil	___ $490
$101 mil – $250 mil	___ $595
$251 mil – $400 mil	___ $810
$401 mil – $750 mil	___ $1,030
$751 mil – $1 bil	___ $1,355
Over $1 billion	___ $1,680
Strategic Partners	___ $1,030
Non-Members	___ $3,355

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.
This program has been approved for 6.5 hours of Kansas CLE credit.

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
PO Box 4407 | Topeka, KS 66604 | Phone: 785-232-3444 | Fax: 785-272-8392 | ksbankers.com