KANSAS BANKERS ASSOCIATION

IRA ESSENTIALS

FEBRUARY 17, 2027 - VIRTUAL

IRA Essentials gives attendees a solid foundation of IRA knowledge. Exercises are included throughout the day to help participants apply information to job-related situations. Attendees will leave this session able to work with IRA owners and process basic IRA transactions with confidence. This is a beginner's session; no previous IRA knowledge is assumed. Attendees should bring a hand-held calculator.

COURSE TOPICS MAY INCLUDE

Introduction and Establishing IRAs

- Identify the tax advantages of Traditional and Roth IRAs
- Summarize the IRA opening document requirements
- Explain the difference between primary and contingent beneficiaries

IRA Funding

- Compare and contrast Traditional and Roth IRA eligibility requirements
- Explain the regular contribution limit
- Distinguish the regular contribution deadline
- State the rules for prior-year contributions
- Discuss the regular contribution reporting deadlines

IRA Distributions

- Identify federal income tax withholding requirements
- Recognize the exceptions to the early distribution penalty tax
- Summarize the tax consequences of Traditional and Roth IRA distributions
- Define a required minimum distribution (RMD) and the required beginning date (RBD)
- Discuss the distribution reporting deadlines

IRA Portability

- Differentiate between a rollover and a transfer
- Distinguish between direct and indirect rollovers between IRAs and employer-sponsored retirement plans

WHO SHOULD ATTEND?

You should attend this seminar if you need to learn the basics of Traditional and Roth IRAs or want an updated, general refresher on IRA rules.

PRESENTER

This webinar and materials will be presented by Ascensus.

PRESENTED BY

ASCENSUS®

2027 WINTER IRA TRAINING ESSENTIALS

February 17, 2027, Virtual

PROGRAM AGENDA

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

ASSET SIZE	ESSENTIALS (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