



IRA ESSENTIALS

Thursday, February 25, 2010

IRAs: ADVANCED

Friday, February 26, 2010

One-Day Seminars presented in St. Louis, Missouri

IRA Essentials

The IRA Essentials seminar is one of our most popular! It's ideal for those new to the retirement plan industry or who need a general IRA refresher. Each year thousands of IRA professionals attend this seminar nationwide to review the fundamentals of Traditional and Roth IRAs—including the latest information on IRA portability, beneficiary, and reporting requirements.

An interactive teaching style combined with real-life examples enhances the learning experience for each attendee. Although designed as an introductory course, instructors will be happy to assist attendees with more advanced questions.

Topics include: understand the IRA establishment process including proper forms, eligibility, contribution limits, the role you should (and should not) play when accepting contributions • RMDs & how to process IRA distributions • moving IRA assets • required documentation requirements & reports

IRAs: Advanced

Now is the perfect time to grow your IRA business with rollovers from employer-sponsored retirement plans. Rollover assets are expected to increase significantly in the next few years. Along with the millions of baby boomers contemplating retirement, job changers, beneficiaries, and the unemployed will need assistance with their retirement assets. ***Is your organization equipped to answer their questions?***

With over \$17 trillion dollars in U.S. retirement savings at stake, IRA professionals must understand the retirement plan rules to attract new clients. This seminar will cover recent trends and market strategies to help you answer clients' questions regarding new rollover opportunities and to help you acquire new IRA assets for your organization. This seminar will also cover complex IRA distribution topics related to these types of transactions.

Topics include: latest law changes affecting the retirement plan industry • strategies for penalty-free distributions • how to capitalize on the new beneficiary portability provisions • how to handle complex distribution issues • key issues for baby boomers moving into retirement

PRESENTED BY Ascensus (formerly BISYS Retirement Services), a recognized leader in retirement services nationwide. Over 10,000 financial organizations, 200,000 employers and 4 million Americans depend on Ascensus for their retirement services needs.

IRA SEMINARS IN ST. LOUIS

TIME: 8:30 AM – 4:00 PM

TUITION: \$199 per person for each seminar. \$180.00 for each additional attendee.

LOCATION: CFT, Laclede Gas Building, 720 Olive, Suite 440, Downtown St. Louis, MO 63101

NAFCU Certified Compliance Officers earn 6 CEUs per course
 Certified IRA Professionals earn 6 CEUs per course .5 CFT credit
 ICB Certifications earn 7.25 credits per course for CISP, CRSP, CTFA

It's easy to take Metrolink! The 8th & Pine Station is in our building. For complete directions to CFT visit www.cftacs.org/documents/directions.pdf

CENTER FOR FINANCIAL TRAINING

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TO REGISTER: FAX COMPLETED FORM TO 860-823-1410

___ IRA Essentials 11/5 ___ IRA Advanced 11/6

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MC VISA CHECK BILL EMPLOYER

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 By signing this form, I accept responsibility for all monies due to CFT and agree to CFT registration policies on www.cftacs.org

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