



## 2011 IRA Institute – White Plains, NY

### Benefits

- Obtain the newest information and industry developments affecting IRAs
- Learn IRA rules through focused, interactive learning sessions
- Network with peers and professional colleagues from across the nation
- Prepare for the Certified IRA Services Professional (CISP) examination

The *IRA Institute*, an intensive five-day program, teaches experienced IRA professionals detailed, essential IRA information. The *IRA Institute* is an excellent program for individuals preparing to take the Certified IRA Services Professional (CISP) exam. Extensive IRA reference materials, objective-based training methods, and practical applications of IRA rules create an effective learning environment.

Attaining the prestigious CISP designation earns an individual national recognition as an experienced, dedicated IRA professional.

### Instructors

All *IRA Institute* instructors are retirement services industry professionals with extensive IRA backgrounds. The instructors research challenging retirement plan issues and rules in an ongoing effort to develop comprehensive and practical training solutions.

### Date and Location

- May 2 – 6, 2011      Optional CISP Exam\* – May 7, 2011  
Crowne Plaza White Plains  
66 Hale Ave.  
White Plains, NY 10601  
914-682-0050

\*An approved, qualified proctor will be available for those individuals sitting for the CISP exam on May 7, 2011.

### Registration Fees

**\$1,495 per person**

To register for the *IRA Institute*, visit our website at [www.ascensus.com](http://www.ascensus.com). To request additional information, contact an Ascensus Customer Service Representative at 800-346-3860, option 2.

*For more information,  
call your Ascensus  
Representative today!*

*Phone: 800-346-3860*

*[www.ascensus.com](http://www.ascensus.com)*

## Learning Objectives

The *IRA Institute* focuses on the operational aspects of

- IRAs (Traditional and Roth),
- SEP plans, and
- SIMPLE IRA plans.

After successfully completing this program, you will be able to

- establish and administer Traditional and Roth IRAs,
- understand the rules for SEP and SIMPLE IRA plans,
- identify contribution eligibility requirements,
- facilitate rollovers and transfers,
- process distributions,
- describe beneficiary options and facilitate beneficiary transactions, and
- manage error resolution, penalties, and reporting.

## Examination

Successfully completing the *IRA Institute*, as well as meeting the eligibility requirements,\* will help you prepare for the CISP exam and potentially obtain a professional designation.

\*Please contact an Ascensus Sales Representative for additional information on eligibility requirements.

## CISP—Certified IRA Services Professional

Becoming a CISP through ABA's Institute of Certified Bankers can have a significant impact on your career. The CISP designation is a well-respected benchmark of experience, dedication, and distinction in the IRA field.

## Continuing Professional Education (CPE) Credits

The *IRA Institute* is approved for continuing professional education credits with the following certification sponsors. Please contact Ascensus at 800-346-3860 for more information regarding CPE credits.

Institute of Certified Bankers (ICB)

- IRA Services Professional (CISP)
- Certified Trust and Financial Advisor (CTFA)
- Certified Retirement Services Professional (CRSP)

Certified Financial Planner (CFP)

National Association of Federal Credit Unions (NAFCU)

- NAFCU Certified Compliance Officer (NCCO)
- Certified IRA Professional (CIP)

The Office of Professional Responsibility, Internal Revenue Service

- Enrolled Retirement Plan Agent (ERPA)
- Enrolled Agent (EA)

*We have entered into an agreement with the Office of Professional Responsibility, Internal Revenue Service, to meet the requirements of 31 Code of Federal Regulations, section 10.6(g), covering maintenance of attendance records, retention of attendance records, retention of program outlines, qualification of instructors, and length of class hours. This agreement does not constitute an endorsement by the Office of Professional Responsibility as to the quality of the program or its contribution to the professional competence of the Enrolled Retirement Plan Agent.*



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