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Advanced IRA Seminars

Presented by the New York Bankers Association in association with Ascensus

"An investment in knowledge always pays the best interest." -Benjamin Franklin



Mar 23, 2017 – NY City
NYBA Office
99 Park Ave, 4th Floor
(212) 297-1699

Mar 28, 2017 - Syracuse
Doubletree Hotel
6301 Route 298 East
East Syracuse, NY
(315) 432-0200

Schedule

8:30 am - Registration
9:00 am - Program
12:00 noon - Lunch
4:00 pm - Adjourn

Questions

Rose Murjani
212-297-1666
rmurjani@nyba.com

Instructor

Frank LaLoggia
Ascensus

Registration Fees

\$275 first registrant
\$245 each additional
registrant

Complete and return
registration on page 2.

Advanced IRAs: Hot Topics for 2017

This advanced workshop takes an in-depth look at some of the most challenging issues facing the retirement plan industry today including, if still applicable by late March, the status of the **Department of Labor Fiduciary rule**. The focus always is on how to apply these advanced concepts to real-life situations.

Who Should Attend?

- Seasoned IRA professionals who need to understand and explain the latest IRA features
- Compliance personnel with procedural oversight of IRA policies and practices

Topic Highlights

- ◆ **Current Status of the Department of Labor Fiduciary Rule**
 - If applicable, impact on IRA plans, including IRA deposit account investments
- ◆ **Required Minimum Distributions**
- ◆ **Beneficiary Options**
 - Death before vs. after the required beginning date
- ◆ **Resolving Contribution Issues**
 - Excess contributions
 - Recharacterizations
- ◆ **Advanced Portability**
 - New PLR fees
 - Self-certification extensions of the 60-day IRA rollover rule
 - Plan rollovers to SIMPLE IRAs
- ◆ **IRA Death Issues**
 - Agents designating beneficiaries
 - Divorce and beneficiary designations
 - Charity/organization as beneficiary
 - Assets disbursed after death
 - Predeceased beneficiaries
 - Beneficiary dies after owner but before receiving assets
 - Beneficiary disclaimers
 - Handling minor beneficiary designations
 - Community property laws

Continuing Education: The New York Bankers Association is an approved sponsor of continuing professional education (CPE) for Certified Public Accountants and is registered with the New York State Board for Public Accountancy.

Ascensus is an approved provider of continuing professional education with: Certified Financial Planner/CFP; and the Institute of Certified Bankers/CISP, CRSP, CTFA. Please call 800-346-3860 to confirm credits.

Registration Form

IRA Seminars – Advanced Hot Topics 2017

Location: (check) New York City: March 23 Syracuse: March 28

Registration Fees: \$275 per registrant; \$245 each additional registrant

Payment type: Check enclosed Please invoice MC Visa Discover

Card # _____ Exp _____

Name on Card _____ V-Code _____

Please fill out completely; copy form for additional registrants

Name _____ Nickname _____ Title _____

Mailing Address _____ **Date Attending** _____

City _____ State _____ Zip _____

Phone _____ Fax _____ E-mail _____

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Name _____ Nickname _____ Title _____

Mailing Address _____ **Date Attending** _____

City _____ State _____ Zip _____

Phone _____ Fax _____ E-mail _____

.....

Name _____ Nickname _____ Title _____

Mailing Address _____ **Date Attending** _____

City _____ State _____ Zip _____

Phone _____ Fax _____ E-mail _____

Authorized by:

Name _____ Title _____

Institution _____ Phone _____

Send registration form and payment to:

New York Bankers Association
Attn: Rose Murjani
99 Park Avenue, 4th Floor
New York, NY 10016

Or, FAX to 212-297-1683

Cancellation Policy: Cancel by 12:00 noon, two weeks prior to the seminar and receive a full refund. Cancel between one and two weeks prior and receive a refund less \$75 cancellation fee. No refunds will be granted for cancellations made less than one week prior to the seminar date. There is no charge for substitutions; please call 212-297-1666 with name(s) of replacements(s).