



Instructor: Pam S.

IRA BASICS

Course #: S5017L

Passumpsic Bank, 1242 Memorial Drive, St. Johnsbury, Vermont

NOVEMBER 6 & 13, 2019

5:30 PM—8:00 PM

course description

IRA Basics is the perfect workshop for individuals who are just starting out in the retirement services industry or for those who simply need a refresher on IRAs.

Attendees will learn the requirements for establishing an IRA, contributing to an IRA, and distributing from an IRA. By using hands-on training and real-life examples, students will experience this information.

Course topics include: Traditional and Roth IRA plan establishment, distributions, portability and required reporting.

If you are looking to learn the basic rules that govern Traditional and Roth IRAs or need a refresher on IRA rules, this is the course for you. The material will enhance the confidence and knowledge for customer interaction.

Looking for more details, [visit our website](#) for a detailed course description.

how to enroll

Enroll online at our website, [CFTEA.org](#) under Professional Skills and Special Topics.

how class works

Course sessions are interactive and run two consecutive weeks in a classroom setting.

tuition

\$295 per participant for training and materials.

withdrawal policy

CFTEA withdrawal policy is outlined within our latest catalog and on our website. Before class begins the enrollment may be transferred to another student with the approval of the student's employer and the CFTEA office.

Would you like to know more about new educational career paths?

Visit us at [cftea.org](#) and follow us on Facebook!