



Instructor: Matt C.

## IRA ADVANCED

Course #: S5016LV—2020 UPDATE

Comfort Inn, 213 Paine Turnpike N., Montpelier, Vermont

Wednesday, March 11, 2020

8:30AM—3:00PM

### course description

IRA Advanced is the perfect workshop for individuals who are looking to gain a deeper understanding of IRAs as well as the regulations that oversee IRA rules. This workshop takes an in-depth look at some of the more challenging issues facing the retirement plan industry today. For example, you will learn how to properly amend IRA documents, how to avoid converting or rolling over ineligible assets, how to establish separate accounting by the required deadline, and how to meet the IRS reporting requirements. You also will receive current information on any legislative changes affecting the retirement plan industry.

By using hands-on training and real-life examples, participants experience how to best assist customers.

#### Course Benefits

After attending this seminar, you will

- Amendment Issues
- Contribution Issues
- Portability Issues
- RMD and Beneficiary Issues
- Reporting Issues

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 session runs live with an experience retirement specialist and classroom interaction.

### tuition

\$295 per participant for all 2020 materials and workbook.

### 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!

# SPRING 2020 Registration and Offerings

## Select courses to register

### January 2020

- 40 Steps to Make Safe Deposit Boxes a Profit Center Webcourse 1/29/2020 (Special pricing discount)
- Commercial Lending Webcourse starts 1/30/2020

### February 2020

- IRA Fundamentals—Machias, Maine 2/5/2020
- Medallion Signature Guarantee—Montpelier, Vermont 2/5/2020
- Notary Public Workshop—Montpelier, Vermont 2/5/2020
- Top 50 Important Safe Deposit Box Operating Procedures Webcourse –2/13/2020

### March 2020

- Quality Service Webcourse starts 3/4/2020
- Money and Banking—Morrisville, Vermont starts 3/5/2020
- IRA Fundamentals—Montpelier, Vermont 3/10/2020
- IRA Advanced—Montpelier, Vermont 3/11/2020
- IRA Fundamentals—Augusta, Maine 3/11/2020
- IRA Fundamentals—Rutland, Vermont 3/11/2020
- HSA Fundamentals—Montpelier, Vermont 3/12/2020
- Top 25 Safe Deposit Compliance Issues Webcourse 3/17/2020
- Written Communication Webcourse starting 3/17/2020
- IRA Fundamentals—Rockport, Maine starting 3/18/2020
- Modern Supervisor—New Gloucester, Maine starting 3/24/2020
- IRA Fundamentals—New Gloucester, Maine 3/31/2020

### April 2020

- Consumer Lending Webcourse starts 4/1/2020
- IRA Advanced—New Gloucester, Maine 4/1/2020

### April 2020

- HSA Fundamentals—New Gloucester, Maine 4/2/2020
- Legal Foundations in Banking Webcourse starting 4/2/2020
- Modern Supervisor—Gilford, New Hampshire starts 4/9/2020
- Enhance Your Potential, Build Your Leadership Narrative Certificate—New Gloucester, Maine starts 4/16/2020
- 30 Steps to Audit a Safe Deposit Department Webcourse 4/22/2020
- Communicate with Confidence, Comfort and Conviction—New Gloucester, Maine 4/22/2020

### May 2020

- Branch Manager Bootcamp—New Gloucester, Maine starts 5/6/2020
- Structuring Commercial Loan Packages—New Gloucester, Maine 5/20/2020

## REGISTRATION - Scan to [tammy@cftea.org](mailto:tammy@cftea.org)

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Month of Birth: \_\_\_\_\_ Day of Birth: \_\_\_\_\_

Email: \_\_\_\_\_

Contact Phone: \_\_\_\_\_

Register for courses selected above or another course and code:

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Approval Signature:

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