



Instructor: Matt C.

## IRA FUNDAMENTALS

Course #: S5017LM—2020 UPDATE

Pineland Conference Center, 16 Pineland Drive, New Gloucester, Maine

Tuesday, March 31, 2020

8:30AM—4:00PM

### course description

IRA Essentials is the perfect workshop for individuals who are just starting out in the retirement services industry, those new to a branch customer service position, employees handling IRAs in Deposit Operations or for those who simply need a refresher on IRAs.

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

#### Course Benefits

After attending this seminar, you will

- understand the IRA establishment process,
- know how to select and complete appropriate IRA transaction forms,
- recall the Traditional and Roth IRA contribution limits,
- realize which procedures to follow when accepting IRA contributions,
- understand how to process IRA distributions,
- recognize the types of reports you must submit to IRA owners and to the IRS, and
- know the pertinent information you must include on required reports.

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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