Instructor: Cynthia S.

IRA FUNDAMENTALS

Course #: S5017LV2 — 2020 UPDATE

Holiday Inn, 476 Holiday Drive, Rutland, Vermont

MARCH 11, 2020

8:30AM — 4:00 PM

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. Includes changes from SECURE Act passed December 2019.

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. Located in Lincoln/Oxford Room. Free parking.

tuition

$295 per participant for all 2020 materials and work-book.

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!

CFTEA
Center for Financial Training & Education Alliance
Unlock your potential.

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

☐ 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

Name:_____

Organization:_____

Month of Birth: _____Day of Birth: _____

Email:_____

Contact Phone:_____

Register for courses selected above or another course and code:

_____

Approval Signature:

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