Community Bankers Association of Illinois

Webinar – On-Demand Web Link

2020 IRA & HSA Update, Including Pending & Breaking Legislation
Wednesday, January 22, 2020
2 - 3:30 p.m.

The winds of change are in the air. As a new year starts, it is important to understand how recent regulatory changes and proposed legislation may impact your IRA and HSA programs. Comprehensive retirement plan legislation is currently pending. The House passed the SECURE Act of 2019. Will the Senate act on this bill or pass similar legislation? While future legislation is hard to predict, there will be a lively discussion of current issues and regulatory proposals. Further, if you interact with IRA and HSA owners, have supervisory, managerial, or decision-making responsibilities, you learn about the many implications regarding what is new and important in 2020 and beyond.

HIGHLIGHTS

- Comprehend the far-reaching effects that pending IRA legislation may have on IRA owners, trustees and custodians
- Review recent IRA reporting guidance, including:
  - How to report and apply the federal income tax withholding rules when escheating IRA assets
  - Reporting and processing IRA-qualified charitable distributions
- Examine the responsibilities of handling and reporting self-certified late rollover contributions
- Distinguish 2019 and 2020 traditional IRA, Roth IRA, and HSA contribution limits
- Determine when married individuals may "double up" on age 55 HSA catch-up contributions
- Understand the employer's versus the financial organization's responsibilities when making and accepting HSA contributions
  - Recouping erroneous employer contributions
  - What happens when employees who are eligible for employer HSA contributions do not establish an HSA?

TAKE-AWAY TOOLKIT

- Employee training log
- Interactive quiz

DON'T MISS THESE RELATED WEBINARS!

IRA Series: Handling IRA Required Minimum Distributions & Roth Distributions on Monday, September 16, 2019
IRA Series: Top 10 Most Misunderstood IRA Issues: Turning Confusion into Confidence on Tuesday, August 27, 2019
IRA Series: IRA Reporting, Common Issues & Error Resolution on Tuesday, August 6, 2019
IRA Series: Processing IRA Rollovers & Transfers on Tuesday, July 9, 2019
Attendance verification for CE credits provided upon request.

WHO SHOULD ATTEND?

This timely webinar provides frontline employees and new account representatives, as well as senior management with operational, compliance, or decision-making authority with important information needed to make informed decisions about IRA and HSA plans and programs. It also benefits individuals who hold insurance or securities licenses.

ABOUT THE PRESENTER

Frank LaLoggia is the president of LaLoggia Consulting, Inc., Rochester, NY, a pension and financial consulting firm that assists financial organizations with ongoing support in the creation, development, and marketing of their retirement plans and financial-services offerings. Nationally renowned, LaLoggia coordinates and conducts pension and financial seminars and training programs throughout the United States, including in-house IRA, HSA, and employer retirement plan training. With more than 35 years' experience in employee benefits, and always in demand, his client list is impressive. He has assisted many leading financial organizations in the pension and financial services industries. LaLoggia has achieved the designation of Deferred Compensation Specialist through Northeastern Universities Center for Continuing Education and The National Retirement Plans Training Conference.

THREE REGISTRATION OPTIONS

1. LIVE WEBINAR

The live webinar option allows you to have one telephone connection for the audio portion and one Internet connection (from a single computer terminal) to view online visuals as the presentation is delivered. You may have as many people as you like listen from your office speaker phone. Registrants receive a toll-free number and pass code that allow entrance to the seminar. The session is approximately 90 minutes, including question and answer sessions. Seminar materials, including instructions, PIN number, and handouts are emailed to you prior to the broadcast. You need the most-current version of Adobe Reader available free at www.adobe.com.

2. ON-DEMAND WEB LINK**

Can't attend the live webinar? The ON-DEMAND WEB LINK** is a recording of the live event including audio, visuals, and handouts. We even provide the presenter's email address so you may ask follow-up questions. Within five business days following the webinar, you are provided with a web link that can be viewed anytime for the next six months. This link expires six months after the live program date.

3. BOTH LIVE WEBINAR AND ON-DEMAND WEB LINK**

Options 1 and 2 described above.

NEW! Listen to the on-demand web link on your iPad, iPhone, Android. Instructions will be emailed to you with the on-demand link.

AFFORDABLE TRAINING, WHEN AND WHERE YOU CHOOSE

REGISTRATION FORM

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Choose Your Training Option:

Purchase (Check one)	**Training Options** ***(Registration includes one location hook-up)***	**CBAI Member**	**Prospective-Member***
	Live Webinar	$275	$475
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	Special Pricing for Live Webinar & **On-Demand Link**	$375	$575

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Material Delivery Options

☐ Check here if you are unable to receive your hook-up instructions and materials via the Internet and hard copies will be mailed to you.

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