COMMUNITY BANKERS ASSOCIATION OF ILLINOIS

Webinar – On-Demand Web Link

Hot IRA Issues: Divorce, IRS Levies, Creditor Claims & Misunderstood Rules
Thursday, April 29, 2021
2 - 3:30 p.m.

This lively session brings you up to date on many consequential issues facing IRA owners, trustees and custodians. Current information, interpretations and best practices are addressed in this practical, easy-to-understand session. Do you know the difference between a transfer versus a distribution due to divorce? When are IRA plan agreements and disclosure statements required to be updated for SECURE Act changes? Join this informative session to explore many current and important IRA rules and turn confusion into confidence when dealing with common, but often misunderstood, IRA scenarios.

HIGHLIGHTS

- Review the deadlines for updating IRA plan agreements and disclosure statements
- Identify the most misunderstood rules under the SECURE Act
- Discover how to handle various scenarios surrounding IRS levies, including when IRA accounts are exempt from IRS levy notices
- Understand the difference between a distribution versus a transfer incident to divorce
- Recognize the protection afforded to IRA accounts in bankruptcy versus general creditor scenarios

TAKE-AWAY TOOLKIT

- Employee training log
- Interactive quiz

DON'T MISS THESE RELATED WEBINARS!
IRA & HSA Update: Key Considerations for 2021 on Thursday, January 14, 2021
IRA Beneficiary Designations, Death Distributions & Required Minimum Distributions on Tuesday, July 27, 2021
Top 10 IRA Rollover Mistakes on Wednesday, October 20, 2021
Attendance verification for CE credits provided upon request.

WHO SHOULD ATTEND?

This session provides timely guidance for staff with IRA operational, compliance or reporting responsibilities and who work with IRA owners face-to-face. It also provides managers, registered representatives and licensed insurance representatives with important, practical compliance-related information.

ABOUT THE PRESENTER

Frank LaLoggia is the president of LaLoggia Consulting, Inc., Rochester, NY, a pension consulting firm that assists financial organizations with ongoing support in the creation, development and marketing of their retirement plans offerings. LaLoggia coordinates and conducts retirement plan seminars and training programs throughout the United States, including in-house IRA, HSA and employer retirement plan training sessions. With over 39 years' experience in employee benefits, 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 University's Center for Continuing Education and The National Retirement Plans Training Conference.

THREE REGISTRATION OPTIONS

1. LIVE WEBINAR

The live webinar allows you to have up to three audio and Internet connections 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 two 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

Hot IRA Issues: Divorce, IRS Levies, Creditor Claims & Misunderstood Rules
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Choose Your Training Option:

Purchase (Check one)	**Training Options** ***(Registration includes hookups in up to three locations)***	**CBAI Member**	**Prospective-Member***
	Live Webinar	$275	$475
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