



IRA Seminars • Spring 2020

March 17 & 18 – Courtyard by Marriott, Bismarck ND
March 19 & 20 – Holiday Inn, Fargo ND



IRA Essentials

March 17 – Courtyard by Marriott, Bismarck
March 19 – Holiday Inn, Fargo

Advanced IRAs

March 18 – Courtyard by Marriott, Bismarck
March 20 – Holiday Inn, Fargo

About the Speakers

These IRA seminars will be delivered by Ascensus instructors who are recognized as some of the leading retirement plan experts in the industry.



The instructors have a combined 138 years of Ascensus experience. This, along with their recognized industry designations (CIP, CISP, QKA and QPA), set them apart as true subject matter experts. Come learn from the best!

Who Should Attend

You may want to attend one or both of these seminars if you would like to learn basic rules that govern Traditional and Roth IRAs, need a general refresher on IRA rules, or have a working knowledge of basic IRA operations and want to expand upon that knowledge.

Schedule

8:00-8:30 a.m. Registration & Continental Breakfast
8:30-11:45 a.m. **Program**
11:45 a.m.-1:00 p.m. NDBA Hosted Lunch
1:00-4:15 p.m. **Program**
4:15 p.m. Adjourn

Hotel Information

A block of rooms has been reserved at each hotel. Room rates and deadlines are indicated below. Please call the hotels directly and indicate that you are with “ND Bankers.”

Courtyard by Marriott

3319 N 14th St
Bismarck ND 58503
Phone: 701-223-6667
Room rate: \$139 Deadline to reserve rooms: Feb. 14

Holiday Inn

3803 13th Ave S
Fargo ND 58103
Phone: 701-282-2700
Room rates: \$99 Deadline to reserve rooms: Feb. 18

Questions? Please call NDBA’s SVP of Education Dorothy Lick at 701.223.5303.

NDBA Registration Form IRA Spring Seminars • March 17 - 20, 2020

Registration Information

Price listed is per person, per program.
Register early and save!

	Advance	After 2/19
Registration	\$225	\$245

(NDBA seminar price includes lunch.)

Send form with payment to:

North Dakota Bankers Association
Attn: Registration
PO Box 1438
Bismarck ND 58502-1438

Or **Email** to ndba@ndba.com

Bank: _____
 Address: _____
 City: _____ State: _____ Zip: _____
 Phone: _____

Registrants

Choose seminar & location:

Registrant 1. _____ Essentials Advanced
 Reg. 1 Branch location: _____ Bismarck Fargo
 Reg. 1 Email: _____

Registrant 2. _____ Essentials Advanced
 Reg. 2 Branch location: _____ Bismarck Fargo
 Reg. 2 Email: _____

Registrant 3. _____ Essentials Advanced
 Reg. 3 Branch location: _____ Bismarck Fargo
 Reg. 3 Email: _____



Questions?

Call 701.223.5303.

Total Due:

- Please send an invoice.
- Check is enclosed.
- I'd like to pay by credit card. Please contact me.

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IRA Essentials

IRA Essentials gives attendees a solid foundation of IRA knowledge. Exercises are included throughout the day to help participants apply information to job-related situations. Attendees will leave this session able to work with IRA owners and process basic IRA transactions with confidence. This is a beginner's session; no previous IRA knowledge is assumed. Attendees should bring a hand-held calculator.

Course Topics

- Introduction and Establishing IRAs
- IRA Funding
- IRA Distributions
- IRA Portability

Who Should Attend?

You should attend this seminar if you need to learn the basics of Traditional and Roth IRAs or if you want an updated, general refresher on IRA rules.

Advanced IRAs

Advanced IRAs builds on the attendees' basic IRA knowledge to address some of the more complex IRA issues their financial organizations may handle. This is an advanced session; previous IRA knowledge is assumed. The instructor uses real-world exercises to help participants apply information to job-related situations.

Course Topics

- IRA Update
- Required Minimum Distributions
- Beneficiary Options
- Advanced Portability
- Roth IRA Conversion Contributions
- IRA Excess Contributions

Who Should Attend?

IRA administrators, personal bankers and customer member personnel who have a working knowledge of basic IRA operations and are looking to expand their IRA expertise and provide enhanced customer service; financial professionals who recognize IRAs play an integral role in retirement planning; compliance specialists with procedural oversight of IRA policies and practices; and support personnel responsible for promotional materials.

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Continuing Education Credits

These IRA seminars may be eligible for insurance continuing education credits. Please call NDBA for details.



*For more information, please call NDBA's SVP of Education
Dorothy Lick at 701.223.5303.*

