

NDBA Fall IRA Seminars

October 26 & 27, 2026 – Courtyard by Marriott, Bismarck
October 28 & 29, 2026 – Holiday Inn, Fargo



IRA Fundamentals

October 26 – Courtyard by Marriott, Bismarck
October 28 – Holiday Inn, Fargo

Advanced IRAs

October 27 – Courtyard by Marriott, Bismarck
October 29 – Holiday Inn, Fargo

IRA Fundamentals Highlights

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

Advanced IRAs Highlights

- IRA Reporting
- IRA Excess Contributions and Recharacterizations
- Required Minimum Distributions
- Beneficiary Options
- IRA Withholding Requirements

Who Should Attend

Attend one or both seminars if you want to learn basic rules that govern Traditional and Roth IRAs, need a general refresher on IRA rules, or want to expand your knowledge.

About the Speaker

The IRA seminars will be delivered by **Heidi LeMieur**, vice president of compliance and training for Superior IRA & HSA. Heidi is a true subject matter expert with over 27 years of experience in the industry and extensive knowledge of IRAs, SEPs, SIMPLEs, ESAs, HSAs, as well as employer-sponsored defined contribution and defined benefit plans.



Schedule

8:30-9:00 am	Registration & Continental Breakfast
9:00 am – Noon	Program
12:00-1:00 pm	NDBA Hosted Lunch
1:00-4:30 pm	Program

Locations

Courtyard by Marriott

3319 N 14th St
Bismarck ND
P: 701.223.6667
Room rate: \$139
Room deadline: Sept. 28

Holiday Inn of Fargo

3803 13th Ave S
Fargo ND
P: 701.282.2700
Room rate: \$119
Room deadline: Sept. 27

Registration Information

NDBA Member Registration Fees

\$275/person/program After October 7, add \$25.

Bank: _____

Contact Person: _____ Address: _____

City: _____ State _____ Zip _____

Registrants

Choose Seminar Options:

1. Name: _____ Fundamentals Fargo
 Branch: _____ Email: _____ Advanced Bismarck

2. Name: _____ Fundamentals Fargo
 Branch: _____ Email: _____ Advanced Bismarck

3. Name: _____ Fundamentals Fargo
 Branch: _____ Email: _____ Advanced Bismarck

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