



Advanced IRAs

Covers all the new regulations
4 Wisconsin Locations

On December 23, 2008, President Bush signed into law H.R. 7327, the Worker, Retiree and Employer Recovery Act of 2008. Contained in this legislation are a number of changes and technical corrections for IRAs and defined contribution plans (e.g., 401(k), profit sharing, money purchase pension, 403(b), 457(b), SEP, SIMPLE IRA plans).

This new legislation

- Waives 2009 RMDs for IRA holders, retirement plan participants, and beneficiaries, and
- Affects the operation of Roth IRAs and employer-sponsored plans.

Now is the perfect time to grow your IRA business with rollovers from employer-sponsored retirement plans. Rollover assets are expected to increase from \$260 billion in 2007 to nearly \$500 billion by 2013.* Along with the millions of baby boomers contemplating retirement, job changers, beneficiaries, and a rising number of unemployed individuals also will need assistance with their retirement assets. Is your organization equipped to answer their questions? With over \$17 trillion dollars in U.S. retirement savings at stake, IRA professionals must understand the retirement plan rules to attract new clients. This seminar will cover recent trends and market strategies to help you answer clients' questions regarding new rollover opportunities and to help you acquire new IRA assets for your organization. This seminar will also cover complex IRA distribution topics related to these types of transactions.

*Financial Research Corporation, FRC, IRA Rollover Dynamics 2008

Course Topics

- What's New
- IRA Overview/Comparison
- Accumulating IRA Assets
- Distributing IRA Assets
- IRA Compliance and Reporting Issues

After attending this seminar you will be able to:

- Explain the provisions of recent legislation affecting IRAs,
- Describe strategies for taking penalty-free IRA distributions,
- Learn how to capitalize on the new beneficiary portability provisions,
- Understand how to handle complex IRA distribution issues, and
- Identify key IRA issues affecting baby boomers who are moving into retirement.

You should attend this seminar if you:

- IRA administrators, personal bankers, and member services personnel who have a basic knowledge of IRA operations and wish to learn more about expanding their IRA business
- Financial professionals who want to learn how IRAs may provide income to clients facing unexpected opportunities or challenges
- Compliance personnel wishing to concentrate on IRA issues
- Support personnel responsible for promotional materials that describe the services provided by their organization

Seminar Details:

Madison

January 28, 2009

Marriot Madison West
1313 John Q Hammons Drive

Milwaukee (Brookfield)

January 30, 2009

Courtyard Milwaukee Brookfield
16865 West Blue Mound Road

La Crosse

February 25, 2009

Holiday Inn
200 Pearl St

Eau Claire

February 27, 2009

Holiday Inn
2703 Craig Road

Sign-in: 8:00am
Time: 8:30am – 4:15pm
Cost: \$199 per participant

Speaker

Ascensus, a respected leader in the IRA and retirement plans industry, understands the complexities and service needs of the retirement plans marketplace. The company's rich history began nearly 30 years ago when it established the first of its divisions—Retirement Products and Solutions (RPS). Since its inception in 1975, RPS has provided solutions to organizations seeking to achieve and maintain operational compliance, as well as to organizations seeking to capture market share in the IRA and retirement plans industry.

Registration Information

Fax or mail this registration form, or register online, prior to seminar date. Make checks payable to Center for Financial Training (CFT). Withdrawals made prior to the registration deadline will receive a full refund or a credit toward a future CFT seminar. Withdrawals after the registration deadline and no-shows will not receive a refund or credit



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Registration Form

Company Information

Company Name <input type="checkbox"/> CBW Member	Contact Email
Company Street Address	City, State, Zip
Supervisor or CFT Rep Name	Supervisor or CFT Rep Signature / and Title
Business Phone	Business Fax

Registrant Information

Name 1	Location: <input type="checkbox"/> Madison <input type="checkbox"/> La Crosse <input type="checkbox"/> Milwaukee <input type="checkbox"/> Eau Claire
Name 2	Location: <input type="checkbox"/> Madison <input type="checkbox"/> La Crosse <input type="checkbox"/> Milwaukee <input type="checkbox"/> Eau Claire
Name 3	Location: <input type="checkbox"/> Madison <input type="checkbox"/> La Crosse <input type="checkbox"/> Milwaukee <input type="checkbox"/> Eau Claire
Name 4	Location: <input type="checkbox"/> Madison <input type="checkbox"/> La Crosse <input type="checkbox"/> Milwaukee <input type="checkbox"/> Eau Claire
Name 5	Location: <input type="checkbox"/> Madison <input type="checkbox"/> La Crosse <input type="checkbox"/> Milwaukee <input type="checkbox"/> Eau Claire

Location (Please indicate total per location)

_____ **Madison, WI** _____ **La Crosse, WI**
_____ **Milwaukee, WI** _____ **Eau Claire, WI**

Total Due to CFT: \$ _____

Checks payable to Center for Financial Training

Fees

\$199 per participant

Registration: 8:00am

Seminar: 8:30am-4:15pm

*No refunds will be given after the registration deadline, however a substitute may attend. Deadline is two weeks prior to seminar date.
If you have any questions, please contact the CFT office at (414) 332-6468 or email info@cftncs.org.*

Payment (Choose one)

<input type="checkbox"/> Bill Bank <input type="checkbox"/> Check Enclosed <input type="checkbox"/> Visa <input type="checkbox"/> MasterCard	Credit Card #	Exp. Date
Name on Card	Cardholder Signature	