IRA Beneficiary Designations, Death Distributions & Required Minimum Distributions

(90-minute webinar – on-demand also available)

Tuesday, July 27, 2021

12:00 PM Pacific	1:00 PM Mountain
2:00 PM Central	3:00 PM Eastern

Register Here

Can you dish the details on IRA distribution options and beneficiary designations? These can be prickly, complicated issues! This session will provide the latest information, guidance, and reference tools necessary to confidently explain IRA complexities to owners and beneficiaries so they can make informed decisions.

AFTER THIS WEBINAR YOU'LL BE ABLE TO:

- Understand the fundamentals of the new beneficiary distribution rules under the SECURE Act
- Examine proper documentation of beneficiary designations
- Determine allowable beneficiary distribution options
- Identify responsibilities versus best practices when handling required minimum distributions
- Know IRS and IRA owner RMD reporting requirements
- Discuss common terminology, including required beginning date, aggregation of plans, and excess accumulations

WEBINAR DETAILS

Managing IRA beneficiary designations and explaining allowable distribution options to IRA beneficiaries may be the most complex area of administering an IRA program. Handling traditional IRA required minimum distributions (RMDs) isn't far behind. This timely session will address beneficiary designations and RMDs, including recent rule changes and implications as a result of the SECURE Act, which significantly altered the rules surrounding required death distributions and required minimum distributions. If you interact with owners, have IRA operational, reporting, or managerial responsibilities, this session will provide a solid understanding of current rules and important considerations.

WHO SHOULD ATTEND?

This program will provide the latest information and guidance to staff who have IRA operational or compliance responsibilities and those who interact with IRA owners or beneficiaries. In addition, management and staff who hold insurance and securities licenses will gain an in-depth understanding of the latest requirements for handling beneficiary and RMD inquiries.

TAKE-AWAY TOOLKIT

- Sample quick reference beneficiary options chart
- Employee training log
- Interactive quiz

DON'T MISS THESE RELATED WEBINARS!

Hot IRA Issues:
Divorce, IRS Levies, Creditor Claims & Misunderstood Rules
on Thursday, April 29, 2021

Top 10 IRA Rollover Mistakes
on Wednesday, October 20, 2021

IRA Overview: Traditional, Roth & SEP Plans
on Tuesday, November 30, 2021

MEET THE PRESENTER

Frank J. LaLoggia, LaLoggia Consulting, Inc.

Frank LaLoggia is the President of LaLoggia Consulting, Inc., Rochester, New York, a pension consulting firm that assists financial organizations with ongoing support in the creation, development, and marketing of their retirement plans offerings.

Frank 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. Frank 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 – WHAT YOU GET

1. Live Webinar Includes

- Unlimited connections within your institution to the Live Webinar
- Handout and Take-Away Toolkit
- Available on desktop, mobile & tablet
- Presenter's contact info for follow-up

2. On-Demand Webinar Includes

- Recording of the Live Webinar
- Available two business days following Live date
- Handout and Take-Away Toolkit
- Available on desktop, mobile & tablet
- Free Digital Download, yours to keep
- Share link with anyone at your institution
- Presenter's contact info for follow-up

3. Purchase the **BOTH Option** to receive all the benefits listed above! Full registration descriptions can be found **here**.

If you need help with anything, please drop us an email at
support@financialedinc.com or call 406.442.2585