IRA Overview:
Traditional, Roth & SEP Plans

(90-minute webinar – available live or on-demand)

Tuesday, November 30, 2021

This is a morning webinar

8:00 AM Pacific	9:00 AM Mountain
10:00 AM Central	11:00 AM Eastern

Register Here

Plan to attend this lively program to learn about the rules governing traditional IRA, Roth IRA, and SEP plans. If you are new to the world of IRA plans or are looking for a general update/refresher on IRA or SEP plan rules, this well-timed webinar is the ticket to implementing best practices.

AFTER THIS WEBINAR YOU'LL BE ABLE TO:

- Identify traditional and Roth IRA eligibility requirements
- Examine IRA contributions limits
- Review IRA distribution rules and requirements, including qualified, tax-free Roth IRA distributions
- Distinguish between IRA rollovers and IRA transfers
- Follow the requirements for establishing and contributing to SEP plans
- Use several quick reference charts that will be provided for future reference

WEBINAR DETAILS

Whether you are relatively new to the IRA world or looking for an informative refresher on traditional and Roth IRA rules, this session is for you. From plan eligibility and contribution rules to portability and plan distribution rules, we will explore the fundamental concepts that will have the greatest impact on your IRA program. We will also explore the fundamental concepts of SEP plans (Simplified Employee Pension plans) and explain how easily SEP contributions may be made directly into existing traditional IRA accounts.

WHO SHOULD ATTEND?

This session will provide valuable information for staff who deal face-to-face with IRA owners or small business owners. The webinar will also benefit those with IRA operational, supervisory, or managerial responsibilities, as well as licensed insurance and registered representatives.

TAKE-AWAY TOOLKIT

- Employee training log
- Interactive quiz

<u>DON'T MISS THESE RELATED WEBINARS!</u>

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

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 **<u>here</u>**.

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