



# IRA Essentials & Advanced IRA's

## about the workshops...

### IRA Essentials

Tuesday, February 23, 2010

The *IRA Essentials* seminar is one of our most popular seminars. Each year thousands of IRA professionals attend this seminar to enhance their knowledge of Traditional and Roth IRA's, including the latest information on IRA portability, beneficiary, and reporting rules. Our experienced instructors use classroom instruction, multimedia presentations, and real-life examples to create an ideal learning environment for attendees. This seminar is designed to teach IRA fundamentals to individuals who are new to the retirement industry or who need a general IRA refresher. Although the *IRA Essentials* seminar is an introductory course, our instructors will assist attendees with more advanced questions.

### Advanced IRA's

Wednesday, February 24, 2010

As the first decade of a new century comes to a close, more of us face an uncertain future than ever before. The changing landscape of our employment, retirement, and taxation continues to occupy much of our thoughts and activities as we move closer to a new decade. Has your IRA department adapted to these economic changes and trends? This course explores distribution and income planning options for IRA holders and their beneficiaries as they approach retirement. For example, the Roth IRA will be available for the first time to a new group of previously ineligible individuals. How will this new option affect their plans for the future? The baby boomers are beginning to distribute their long-saved retirement assets. How will they maximize those assets and how will they pass on those assets to their loved ones? Learn the answers to these questions and more by attending this dynamic seminar.

## your seminar leader...

These seminars are co-sponsored by CFT and the Arkansas Community Bankers Association. They will be presented by **Ascensus** (formerly BISYS Retirement Services), a recognized leader in retirement services nationwide. Over 10,000 financial organizations, 200,000 employers, and 4 million Americans depend on Ascensus for their retirement services needs.

## where and when...

These popular seminars will be held at the **Comfort Inn and Suites at the Clinton Library**, 707 Interstate 30, **Little Rock, Arkansas**, from **8:30 a.m. - 4:15 p.m. each day**. Continental breakfast will be available at 8:00 a.m.

\_\_\_\_\_ **IRA ESSENTIALS** - Tuesday, February 23, 2010  
\_\_\_\_\_ **ADVANCED IRA'S** - Wednesday, February 24, 2010

Please select your seminar(s) above. Call Scott Briggs at 800-795-5242 x1180 if you have any questions.

Name \_\_\_\_\_ E-mail \_\_\_\_\_ Phone \_\_\_\_\_  
Company Name \_\_\_\_\_  
Address \_\_\_\_\_

Price: \$199.00 x \_\_\_\_\_ = \$ \_\_\_\_\_ (additional attendees are \$180 per person)

\_\_\_ Bill My Employer \_\_\_ Check Enclosed \_\_\_ Visa or MC # \_\_\_\_\_ Exp. Date \_\_\_\_\_

Cardholder Signature \_\_\_\_\_  
Supervisor or CFT Rep Approval (if applicable) \_\_\_\_\_

**Please mail to:** Center for Financial Training, Attn: Scott Briggs, P.O. Box 969, Norwich, CT 06360  
**or fax to:** 860-823-1410. You can also register online at [www.cftacs.org](http://www.cftacs.org).