FALL 2025 SEMINARS & WEBINARS

Attend Our In-Depth IRA Training and Be Prepared for Final SECURE Act Regulations Now in Effect in 2025 and Beyond

Why Attend?

Our 50 years of old-fashioned know-how training is a must whether you are just starting out or looking to expand your IRA knowledge.

The more you know, the more success you can provide for your clients. Our IRA Training Seminars and Webinars help ***make you the expert.***

What We'll Cover

- ★ **NEW Trump IRA Account**
- **New Bank Reporting for QCDs**
- **New Rules Affecting Spouse Beneficiary**
- **Case Studies of Common Real-Life Situations**
- **Comprehensive Need-to-Know Info for New Hires**

pmc IRA & HSA Resources

We Make You the Expert

Join Us for the Best In-Person IRA Training in America!

DAY 1

- ★ IRA Contributions and Deductions
- ★ IRA Rollovers, Transfers and Conversions
- ★ IRA Distribution Compliance
- ★ Lifetime Required Minimum Distributions
- ★ Understanding Death Distributions

DAY 2

- ★ 2025 IRA Update Including Trump IRA Account
- ★ Knowing IRS Reporting Requirements
- ★ Solving Beneficiary Distribution Issues
- ★ Case Studies

FREE SEMINAR OUTLINE!

Each attendee will be given their own **free** Workshop Manual which they can refer to throughout the seminar. It also serves as a handy reference guide upon their return to the office.

CRANFORD, NJ

1 DAY ONLY!
IRA BASICS EVENT

New to IRAs? Start With This Live Seminar

- Overview of Traditional and Roth IRA Contributions
- Moving IRAs: Rollovers and Transfers
- Learn the Basics of Required Minimum Distributions
- IRA Distribution Basics
- Death Distribution Options for Beneficiaries

September 15
New Jersey Bankers Association
411 North Avenue East
908-272-8500
Endorsed by New Jersey Bankers Association

ALTOONA, PA

September 29 & 30
Wingate by Wyndham
909 Chestnut Avenue
814-515-2233
Endorsed by PA Bankers Association

KING OF PRUSSIA, PA

October 6 & 7
The Alloy by DoubleTree Hilton
301 W. Dekalb Pike
610-337-1200
Endorsed by PA Bankers Association

COLUMBUS, OH

October 15 & 16
Ohio Bankers League
4215 Worth Avenue, Suite 300
614-340-7595
Endorsed by Ohio Bankers League

HARRISBURG, PA

October 27 & 28
Pennsylvania Bankers Association
3897 N. Front Street
717-255-6900
Endorsed by PA Bankers Association

REGISTER NOW! ONLY $325*

Per Day, Per Attendee

****Additional attendees at HALF PRICE with the purchase of one!***

pmc-corp.com/training
1-800-233-3207

Please Note: Registration **begins at 8:30 a.m.** Seminars begin at 9 a.m. and run until 4 p.m. Sessions recess for lunch (on your own) at noon and resume at 1 p.m. There will be morning and afternoon breaks. Beverage service will be provided.

Consider ANY or ALL of Our Seven Pre-Recorded Webinars!

- **All applicable webinars to cover final RMD regulations.**
- All pre-recorded webinars to release on September 12, 2025.
- Upon purchase you will have 60 days to view.
- **Plus FREE phone-in Q&A session with each webinar purchased.**

IRA Update

- Trump IRA Account
- New Qualified Charitable Distribution (QCD) Reporting for Financial Organizations — Effective This Year
- New IRS Guidance for Death Distributions
- All the Most Recent Changes for IRAs in 2025

Solving Beneficiary Issues

- Updated for SECURE and SECURE 2.0 Acts
- Avoiding Mistakes When Beneficiaries Inherit an IRA
- Federal Withholding and Taxation Rules for Beneficiaries
- Solutions to Common Beneficiary IRA Problems

IRA Rollovers, Transfers and Conversions

- Master the Difference Between IRA-to-IRA Rollovers and Transfers
- Learn About Traditional IRA to Roth IRA Conversions
- Discover the Exceptions That Apply to the 60-Day Rollover Rule

ONLY $249

Per Pre-Recorded Webinar

(Approximately 60 minutes each)

Death Distributions

Part 1

- Understand IRA Beneficiary Options
- Eligible and Non-Eligible Beneficiaries
- Updated for New IRS Regulations
- The 10-Year Rule With Death RMDs

Part 2

- Calculating Death RMDs for Beneficiaries
- Issues Affecting Multiple Beneficiaries and Successor Beneficiaries
- Case Studies Used for Different Scenarios
- Solutions to Common Beneficiary IRA Problems

Purchase together for

ONLY $229 EACH

(Approximately 60 minutes each)

All seminars and webinars are co-sponsored by:

OBL Ohio Bankers League

NJBankers MAKING CONNECTIONS

PA Bankers ASSOCIATION

PURCHASE DIRECT WITH PMC!

pmc-corp.com/webinars

1-800-233-3207

Your Low-Cost Fee Covers the Pre-Recorded Webinar, Plus Reproducible Outline!

MINI-LESSONS

Roth IRAs

- Only the Roth IRA Rules, and Only the Basics
- Contribution Eligibility
- Rolling Over, Transferring and Converting Funds to a Roth IRA
- Roth IRA Beneficiary Options

Traditional IRA Lifetime RMDs

- Ascertain the RMD Rules That Apply to IRA Owners
- Master How to Calculate Annual RMDs
- Learn How to Find the Right Life Expectancy Factor

ONLY $125

Per Pre-Recorded Mini-Lesson

(Approximately 30 minutes each)