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

REGIONAL IRA SEMINARS

DAY 1

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

DAY 2

- ★ 2025 IRA Update Including Final RMD Regulations
- ★ Understanding Death Distributions
- ★ Solving Beneficiary Distribution Issues
- ★ Case Studies

KING OF PRUSSIA, PA
February 24 & 25
the Alloy by DoubleTree Hilton
301 W. Dekalb Pike
610-337-1200
Endorsed by PA Bankers Association

COLUMBUS, OH
March 5 & 6
Ohio Bankers League
4215 Worth Avenue, Suite 300
614-340-7595
Endorsed by Ohio Bankers League

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March 17 & 18
New Jersey Bankers Association
411 North Avenue East
908-272-8500
Endorsed by New Jersey Bankers Association

HARRISBURG, PA
March 24 & 25
Pennsylvania Bankers Association
3897 N. Front Street
717-255-6900
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PITTSBURGH, PA
March 31 & April 1
DoubleTree Pittsburgh Airport
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April 7 & 8
Findlay Inn & Conference Center
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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.

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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 Six Pre-Recorded Webinars!

- **All applicable webinars to cover final RMD regulations.**
- All pre-recorded webinars to release on February 14, 2025.
- Upon release you will have 60 days to view.
- **Plus FREE phone-in Q&A session with each webinar purchased.**

IRA Update

- New Law Changes for IRAs in 2025
- IRS Waives Penalty for Missed 2024 Death RMDs for Certain Beneficiaries
- New IRS Guidance for Certain New Exceptions to 10% Penalty

Understanding Death Distributions

- Beneficiary Designations
- Death Distribution Options
- When the Five-Year Rule Applies
- The 10-Year Rule with Death RMDs
- Updated for New IRS Regulations and the SECURE 2.0 Act

Workplace Retirement Plan Rollovers

- Rules for Moving Funds Between Workplace Retirement Plans and IRAs
- Rollover Eligibility
- Learn the Differences Between a Direct Rollover and Indirect Rollover
- Reporting Requirements
- IRA-to-WRP Rollovers

IRA Basics

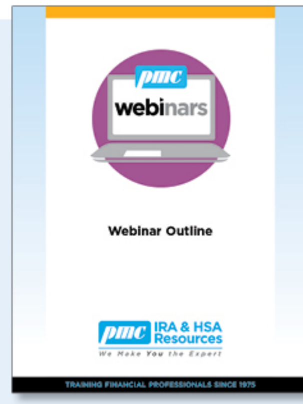
- Overview of Traditional and Roth IRA Contributions
- Moving IRAs: Rollovers and Transfers
- IRA Distribution Basics
- Death Distribution Rules

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

HSA Overview

- HSA Eligibility
- Defining a High-Deductible Health Plan (HDHP)
- 2024 and 2025 Contribution Limits
- Moving Funds from an IRA to an HSA
- Reporting HSA Contributions
- Taxation of Distributions
- Qualified Medical Expenses
- Death Distributions
- Reporting HSA Distributions



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