

2019 IRA Advanced Update & Review

September 26, Eagle Lake



TexasBankersAssociation
Strong Banks. Stronger Communities.

There are new contribution limits to every type of IRA. In order to keep up with the rollercoaster of information being released, attendance is a must to obtain the latest and greatest information, as well as a deeper review of the more technical areas of IRAs. Too many times “experts” post things on the internet that appear to be vague or many times fabricated regarding retirement account rules and regulations. IRAs are a specialized area that requires expertise.

This program focuses on recent changes and the content is at the intermediate to advanced level. It is assumed that participants are familiar with the basics of IRAs. Each participant will receive the complete 275-page Sunwest Training IRA Training and Reference Manual - the “Red Book,” which is constantly updated to reflect the new regulations.

Participants will get the answers to these and many more common questions:

- What are the legislative updates for 2019?
- What are the major changes that will be enacted when the “Secure Act” is passed?
- How do you report Qualified Charitable Distributions on the 1099-R?
- What is the three-piece puzzle to solve regarding rollovers and transfers?
- What is a “late rollover” and when can this exception be used?
- What are the 9 – Yes – 9 biggest mistakes we make on beneficiary payouts?
- Are Health Savings Accounts worth offering to our customers?

WHO SHOULD ATTEND

IRA personnel in New Accounts, CDs, Trust, Investments and Savings Departments who are involved in the opening, selling and administration of IRA accounts will benefit greatly from the thorough discussions of the more complicated aspects of the IRA and from the “Annual IRA Update and Review.” This is considered an Intermediate workshop.

YEAR 2019 HIGHLIGHTS

- Legislative updates including: IRA Cost of Living Adjustments and the Secure Act
- Health Savings Account qualifications and custodial responsibilities
- How to avoid the 6 biggest mistakes of Qualified Plan Rollovers
- IRA Transfers vs. IRA Rollovers – You MUST know the difference!!
- IRA Distributions including Minimum Distribution and Beneficiary Options:
 - Distributions at 70½
 - 9 Red flags of IRA beneficiary payouts

PRESENTER

Patrice M. Konarik is president of Sunwest Training Corp. founded 25 years ago and is located in the Texas Hill Country near San Antonio. With over 30 years’ experience in the financial industry, Patrice has focused her expertise on the retirement areas and is currently providing live training and Webinars on retirement accounts and Health Savings accounts on a nationwide basis. She has a bachelor’s of science degree in management science from New York’s Binghamton University. Many state banking associations and other organizations use her as their main source for training on these complicated topics.



SCHEDULE

8:30 – 9:00 a.m.	Registration & Breakfast
9:00 a.m. – Noon	Program
Noon – 1:00 p.m.	Lunch
1:00 – 4:00 p.m.	Program

REGISTRATION

Register online or complete the attached form and submit via email or mail. The registration fee includes program materials, breakfast and lunch. For IRS reporting purposes, the food cost portion of your registration is approximately \$75.

CANCELLATION

Cancellation/substitution requests must be made in writing. Email requests to education@texasbankers.com. Full registration fees will be refunded if written notice is received no later than **Sept. 19, 2019**. Substitutions are permitted without penalty.

CONTINUING EDUCATION

Texas State Board of Public Accountancy: 6 CPE credit hours. There are no educational prerequisites.

ABA Professional Certifications: Application for CE credit is pending approval. Attendees will be notified once approval has been confirmed.

LOCATION

FIRST NATIONAL BANK EAGLE LAKE

100 COMMERCE ST.
EAGLE LAKE, TX 77434
972-869-4300

Please do not park directly in front of the bank. There is ample street parking nearby and a lot across the street.

2019 IRA ADVANCED UPDATE & REVIEW SEPTEMBER 26, EAGLE LAKE, TX

Register online or complete a separate form for each registrant.

Online: www.texasbankers.com/store

Email: register@texasbankers.com

Mail: Texas Bankers Association

P.O. Box 2569

Austin, TX 78768-2569

800-462-7295 | 512-472-8388

TBA Members:

- 1-3 registrations, \$350 per person per day
- 4+ registrations, \$325 per person per day

Nonmembers:

- \$750 per person per day

Name Mr. Ms.

First Name for badge

Title

Bank/Company

Business Address

Mailing Address (if different from above)

City/State/Zip

Phone

Fax

Email

Please note any special accommodations below (i.e. ADA, food allergies, dietary requests, etc.)

To expedite your registration, please include any other names you have used (i.e. maiden name, formal name or nickname) and, if applicable, any other financial institutions you have previously worked for.

Other Names

Other Financial Institutions