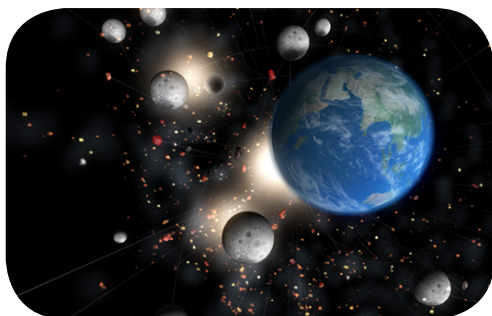


# 2017 IRA School

AUGUST 16-17, 2017 • 8:30 A.M. - 4:00 P.M.

EMBASSY SUITES • RIDGELAND, MS

## Exploring the Universe of IRA Rules and Regulations



So you have finally received that “promotion” you never wished for – IRA Guru!! On the first day of training, you feel like someone put you in a rocket ship and launched you into outer space. In other words, you have NO IDEA what they are talking about. Everything just sounds alien to you. It’s true. IRAs are a different world from the other accounts at your bank. Oh, they may look similar, but the rules, regulations and

IRS reporting build the complications to the point where you feel like you are on another planet!! And, just when you finally grasp it, they change the rules again!

While it may take years to build a confidence level where you can answer almost any question thrown your way, the goal of these two days is to raise your comfort level if you are a rookie and to reinforce your knowledge if you have a higher level of experience. You will also receive your favorite “tool” – the 250-page 2017-2018 Sunwest Training Corp’s IRA Training and Reference Manual - which is not only full of easy-to-follow IRA information, but also lots of “Cheat Sheets” and “Quick Reference Tools” to get you through your day-to-day tasks of dealing with your IRA customers.

This intensive 2-day format will help you pull it all together by helping you learn the following:

1. Understanding the Top 20 Basic Terms of IRAs.
2. Next we will review the most commonly used forms to create and complete IRA transactions. (Since this is not vendor-form-specific, please bring a copy of your bank’s IRA Application form, Contribution Form, Distribution Form and Rollover Review or Rollover Certification Form as well as any other forms you may have questions on).
3. As the day goes on, you will pick up knowledge of the IRA plan types, Traditional, Roth and SEP.
4. As we go into the second day, we will nail down the use of the proper terminology of “Rollover” vs. “Transfer” when moving money from an employer plan to an IRA and from an IRA to an IRA.

### **IRA to IRA Rollover rules had big changes effective 2015!!**

5. **NEW** How to report “late” or “tardy” rollovers on the 2017 5498.
6. Finally, as the trip is completed, you will master the complicated areas of IRA Distributions to owners and beneficiaries and IRS reporting, resulting in a better picture of this complicated topic.

Whether you are looking to gain basic knowledge of IRAs, raise your comfort level or sharpen your skills with the most up-to-date rules and regulations, this two day format will cover everything!

## Who Should Attend?

- New Account Representatives
- Certificate of Deposit Personnel
- Savings Counselors
- Accountholder Service Representatives
- Investment & Trust Personnel
- Officer managers who oversee IRA department
- Any IRA Personnel

### **Presenter:**

PATRICE M. KONARIK

Konarik is president of Sunwest Training Corp. founded over 20 years ago and is located in the Texas Hill Country near San Antonio, Texas. With over 30 years in the financial industry, Konarik has focused her expertise on the retirement and new account areas and is currently providing live training and Webinars on these subjects on a nationwide basis. She has a BS 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.

***You are encouraged to bring a sample of the IRA forms your financial institution is currently using including application, contribution and distribution form and rollover review or certification form.***

**Registration Information**

- **MBA Members:**  
Both days: \$550 for first registrant and \$490 for each registrant from the same bank.  
1-day: \$275 for first registrant and \$245 for each registrant from the same bank
- **Non-Members:** \$1100 for registrant.

Hotel reservations are NOT included in registration fees.

**Cancellation Policy**

Full registration fees will be refunded if a cancellation is received on or before August 9, 2017. After that date, a \$50 processing fee will be retained. No refunds will be granted for cancellations made the day of the conference. Substitutions are welcome at no charge.

**Hotel Information**

Hotel reservations may be made by calling the Embassy Suites at (601) 607-7112. Please reference the Mississippi Bankers Association when making your reservation to get the special rate of \$149 until July 15. The attendee is responsible for room payment including taxes and expenses.

**More Information**

Dress for the workshop is business casual. We recommend that you bring a light sweater or jacket in the instance the room is cool. Registration will begin at 8:30 a.m. on Wednesday, August 16. If you need additional information, please contact Lori at the MBA Office by calling 601-948-6366 or by emailing [lrichardson@msbankers.com](mailto:lrichardson@msbankers.com)



**2017 IRA School**

AUGUST 16-17, 2017

PLEASE DUPLICATE FORM FOR EACH REGISTRANT

BANK/COMPANY NAME: \_\_\_\_\_

REGISTRANT NAME: \_\_\_\_\_

BANK ADDRESS: \_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_

FAX NUMBER: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

(SEE REGISTRATION INFORMATION ABOVE FOR FEE BREAKDOWN)

**BOTH DAYS**

- \$550 FOR MBA MEMBER FIRST REGISTRATION
- \$490 FOR EACH ADDITIONAL REGISTRATION

**1- DAY**

- \$275 FOR MBA MEMBER FIRST REGISTRATION
- \$245 FOR EACH ADDITIONAL REGISTRATION

\$1100 FOR NON-MEMBER REGISTRATION

Each individual registration will receive a confirmation of registration via email or fax. Please contact the MBA at (601) 948-6366 if you do not receive a confirmation within 48 hours.

TO REGISTER: Scan & Email to [lrichardson@msbankers.com](mailto:lrichardson@msbankers.com).

We would like to take this time to recognize our MBA PROGRAM PARTNERS, listed below, that provide support to the MBA for a wide-range of events throughout the year. Please take a moment to thank representatives of these companies when you get the chance!



2017 Mississippi Bankers Association  
***Program Partners***

