

2024 Advanced IRAs Seminar

Presented by: Agatha Schmidt, Ascensus

October 29 — Storm Lake
October 30 — Johnston
October 31— Cedar Rapids

Advanced IRAs builds on the attendees' basic IRA knowledge to address some of the more complex IRA issues that their financial organizations may handle. This is an advanced session; previous IRA knowledge is assumed. The instructor uses real-world exercises to help participants apply information to job-related situations.

Course Topics

- IRA Update
- Beneficiary Options
- Amending IRA Documents
- Advanced Portability
- Required Minimum Distributions
- Finding Answers to Commonly Asked Questions

Who Should Attend?

- An IRA administrator, personal banker, or member services personnel who has a working knowledge of basic IRA operations and wishes to expand your expertise and provide enhanced customer service;
- A financial professional who recognizes that IRAs play an integral role in retirement planning;
- A compliance specialist with procedural oversight of IRA policies and practices; or
- Support personnel responsible for promotional materials that describe the services provided by your financial organization.

REGISTRATION

Registration Fee:

\$245 – IBA Member (*per person*)
\$490 – IBA Non-member (*per person*)
Registrations accepted until 10/27/24

Registration Includes:

Continental breakfast, program materials, lunch, refreshment breaks.

Cancellation Policy:

Refunds will be made if requested one week prior to seminar date. No refunds after that date. Substitutions allowed at

Register online:

www.iowabankers.com
(*Events tab – scroll to date*)

Or mail registration form with payment to:

Iowa Bankers Association,
Attn: Registrar, PO Box 6200,
Johnston, IA 50131

For online registration and information about additional IBA training and development see www.iowabankers.com

IBA Event Code #481

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Storm Lake – Oct. 29 Johnston – Oct. 30 Cedar Rapids – Oct. 31

Bank _____

1. Name _____

Address _____

Email _____

City _____ State _____ ZIP _____

2. Name _____

Phone _____

Email _____

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About the Speaker

Agatha Schmidt is a Senior ERISA Analyst with the ERISA Services Department at Ascensus. In her position, Agatha consults with financial organizations on technical compliance matters through Ascensus' 800 Consulting Services and serves as an instructor for webinars and various Ascensus-sponsored seminars nationwide. She lends technical expertise regarding IRAs, health savings accounts, Coverdell education savings accounts, and employer-sponsored plans. She also participates in technical reviews of documents, forms and publications, and performs compliance audits.

Agatha joined Ascensus in 2017, having over a decade of experience in the financial services industry. She has held progressive roles in the retail banking space and in the self-directed IRA space, specializing in alternative assets, encompassing customer service, sales, marketing and operations. Agatha attended the Sprott School of Business at Carleton University in Ottawa, Ontario, Canada, and holds a Bachelor of Commerce degree. She has received the designations of Certified IRA Services Professional (CISP) from the Institute of Certified Bankers (ICB), the Certified Self-Directed IRA Professional (SDIP) from the Retirement Industry Trust Association, as well as the Certified Health Savings Professional (CHSP) from the National Association of Federal Credit Unions (NAFCU).

Agenda

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

Special Needs

If you need accommodations for a disability or a dietary restriction, please contact Hannah Sloan in advance of the program. Special menu requests made the day of the seminar cannot be guaranteed and may require an additional charge.

Dates & Locations

Seminar participants may contact the hotels in the area to arrange lodging accommodations. A room block has not been reserved. Online reservations offer the lowest room rate.

Storm Lake - Tuesday, Oct. 29

King's Pointe Resort
1520 E. Lakeshore Drive
Storm Lake, IA 50588

[☎ 712-213-4500](tel:712-213-4500)

Johnston - Wednesday, Oct. 30

Iowa Bankers Association
8901 Northpark Drive
Johnston, IA 50131

[☎ 515-286-4300](tel:515-286-4300)

Cedar Rapids - Thursday, Oct. 31

Hilton Garden Inn Cedar Rapids
4640 N River Blvd. NE
Cedar Rapids, IA 52411

[☎ 319-378-7404](tel:319-378-7404)

Questions

Contact Hannah Sloan at:

[✉ hsloan@iowabankers.com](mailto:hsloan@iowabankers.com)

[☎ 515-286-2915](tel:515-286-2915)