

2025 Advanced IRAs Seminar

Presented by: Ascensus

October 28 — Storm Lake

October 29 — Johnston

October 30 — 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:

\$255 — IBA Member (*per person*)
 \$510 — IBA Non-member (*per person*)

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 any time prior to seminar date.

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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Bank _____

1. Name _____

Address _____

Email _____

City _____ State _____ ZIP _____

2. Name _____

Phone _____

Email _____

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About Ascensus

Ascensus is the largest independent retirement and college savings services provider in the United States, helping over 7 million Americans save for the future. With more than 35 years of experience, the firm partners with financial institutions to offer tailored solutions that meet the needs of financial professionals, employers, and individuals. Ascensus specializes in recordkeeping, administrative, and program management services, supporting over 40,000 retirement plans and 3.5 million 529 college savings accounts. It also administers more than 1.5 million IRAs and health savings accounts and is home to one of the largest ERISA consulting teams in the country. For more information about Ascensus, visit www.ascensus.com.

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. 28

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

[☎ 712-213-4500](tel:712-213-4500)

Johnston - Wednesday, Oct. 29

Iowa Bankers Association
8901 Northpark Drive
Johnston, IA 50131

[☎ 515-286-4300](tel:515-286-4300)

Cedar Rapids - Thursday, Oct. 30

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)