

IRA PROFESSIONAL SCHOOL

Curriculum

Introduction & Overview
Comparing the Different Types of IRAs
Shared Features of IRAs
Traditional IRAs
Roth IRAs
Education IRAs
SEPP IRAs
SIMPLE IRAs
Investment Issues
Rollover, Transfer and Inherited IRAs
IRA Conversions, Recaracterizations and Redesignations
Distributions from IRAs
Beneficiary Designation
Taxation and Withholding
IRS Forms and Documentation
Regulation and Legislation Update
Gift, Estate and Generation Skipping Transfer Taxation
Knowledge Assessment and Review

With the aging of the baby boom generation and the uncertain future of the social security system, individual retirement planning is more important than ever. The largest single pool of private retirement assets is made up of individual retirement accounts comprising over \$2.6 trillion. IRA assets have more than quadrupled in the last decade and the trend is expected to continue.

This course is geared to those professionals responsible for establishing or maintaining traditional and Roth IRAs and those responsible for advising clients on how to navigate the complex and ever-changing tax rules pertaining to these accounts. Upon completion of the course the candidate is prepared to sit for the Certified IRA Services Professional (CISP™) exam.

Who Should Attend

- Persons responsible for IRA compliance and/or operations
- An IRA Services Professional seeking to learn more about IRAs to enhance career advancement opportunities
- An IRA Manager and/or Professional interested in pursuing a CISP™ designation
- Employee Benefit Officers
- Employee Benefit Administrators
- Employee Benefit Administrative Assistants
- Participant Record-keepers
- Employee Benefit Auditors
- Compensation and Benefit Managers
- Plan Sponsors
- New Business Development Officers
- Private Bankers
- Retail Brokers
- Financial Planners
- Insurance Representatives
- Branch Personnel dealing with IRAs
- Anyone needing CE Credits for a Certification

Key Benefits

- Learn the required steps for qualifying and establishing sample IRA and SEPP IRA retirement plans
- Learn key features and differences among the major types of retirement plans
- Learn the essential elements for determining eligibility, participation and vesting in a retirement plan
- Learn the mechanics of plan accounting and participant record keeping
- Learn what regulators expect in key administrative and record keeping areas
- Learn how investment performance should be communicated to plan sponsors and participants
- Learn how to apply recent changes in tax and distribution rules
- Learn about the emerging opportunities in new services and fees
- Learn the reporting rules for IRA distributions and contributions
- Examine many of the core competencies needed to become a CISP™
- Acquire in-depth knowledge about IRAs that will lead to better service for your clients/customers
- Improve your retention of IRA rules through intense, highly interactive learning sessions
- Interact with leading IRA professionals from financial organizations nationwide, creating a new network of professional contacts
- Receive a diploma issued by Cannon verifying your participation in this prestigious, intense learning program

Class Schedule

Registration and orientation take place on Sunday and class begins on Monday at 8:00 AM. The CISP™ exam is given on Saturday morning and will conclude by Noon. Attendance is mandatory at all sessions.

COURSES



LOCATIONS



South Bend, IN

REGISTER

COURSES

Accreditation

Cannon's IRA Professional School provides preparation for the Institute of Certified Banker's (ICB™) Certified IRA Services Professional (CISP™) designation exam. The CISP™ exam is offered onsite the last day of IRA Professional School. For information on eligibility and exam application requirements, please contact the ICB™ at 202-663-5380.

Faculty

Lawrence T. Divers

Executive Vice President
Cannon Financial Institute
Athens, GA

Duane E. Lee, II

Executive Vice President
Cannon Financial Institute
Athens, GA