

COURSES



LOCATIONS



Myrtle Beach, SC

REGISTER

COURSES

Curriculum

Investments

Advanced Investment Techniques and Updates

Annuities
Exchange-Traded Funds
Options
Real Estate Investment Trusts
Investment Policy Statements
Measuring Risk & Return

Executive Compensation

Qualified Retirement Plans
Non-Qualified Retirement Plans
Compensatory Stock Plans
ISO's, NQSO's, Restricted Stocks
New 409 A Regulations

Distribution Planning

Integrating Retirement Plans with Estate Planning
Advising Clients on Rollover Options vs. Lump-Sum Options
Distribution Planning Issues with Employer Stock
Planning for Required Minimum Distributions
Naming Trusts as Retirement Plan Beneficiaries
Charitable Tax Planning for Retirement Plan Assets
Lump-Sum Distributions from Retirement Plans
Planning & Avoiding the 10% Premature Withdrawal Penalty

Advanced Fiduciary Issues & Update

Plan Administration & Design

ROTH 401(k)'s
457 Plans
403(b) Plans

Repositioning Retirement Plans to Meet Employees' Needs Under EGTRA 2001

Regulatory Issues

Regulatory Update and Legislative Update

Cannon has developed the ideal course enabling experienced professionals to gain skills, technical knowledge and the most up-to-date information pertaining to the ever-changing and complex field of Retirement Plan Administration. This course is for experienced Retirement Plan Services professionals and graduates of Cannon's Retirement Plan Services School who want to test and fine-tune their skills as well as keep abreast of the latest changes in the field and share ideas with other professionals.

Retirement Plan Services professionals holding the Certified Retirement Services Professional (CRSP™) designation are required to earn 30 credit hours of continuing education every three years. This course meets and exceeds the minimum standards in each subject area and provides 20 total hours of comprehensive and timely updates of issues vital to the industry.

Who Should Attend

- Retirement Plan Administrators with at least five years of experience
- Graduates of qualified Schools
- Certified Retirement Plan Services Professionals (CRSPs™) seeking qualified continuing education
- Those seeking CE credit for other certifications and licenses
- Persons responsible for Retirement Plan compliance and/or operations
- Retirement Plan Services Managers interested in expanding technical knowledge

Key Benefits

- Enhance your professionalism by maintaining the Certified Retirement Plan Services Professional (CRSP™) designation
- 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 emerging opportunities in new services and fees
- Interact with leading Retirement Plan Professionals from financial organizations nationwide, creating a network of professional contacts
- Acquire an in-depth knowledge needed to better serve your clients
- Upon completion of the school, participants will take back to their jobs timely, relevant ideas, tools and skills to apply immediately in their day to day administrative responsibilities

Class Schedule

Registration and orientation take place on Sunday and class begins on Monday at 8:00 AM and concludes at 3:00 PM on Friday. Attendance is mandatory at all sessions.

Faculty

Lawrence T. Divers

Executive Vice President
Cannon Financial Institute
Athens, GA

Duane E. Lee, II

Executive Vice President
Cannon Financial Institute
Athens, GA