

IRA Essentials

This seminar includes some information on distributions and death distributions. Seminar attendees will leave with less apprehension about their responsibilities and compliance issues for opening IRAs at their credit union.

What you will learn:

- Product review
- Rollovers and Transfers
- Basics on Premature Distributions
- Basics on 70 ½ Distributions
- Inherited IRAs
- Compliance
- Reporting

Speaker: Christy Crawford is the Assistant Vice President with gettechnical inc. in Baton Rouge, LA. Formerly a trainer for Wal-Mart Corporation, Christy brings her eight years of sales and training expertise to your financial institution.

WHEN: February 2, 2012

TIME: 11:00 am – 1:00 pm EST

Educational Investment: \$199 per telephone connection.

Unlimited Listeners and Free Audio Archive available for 60 days after the session.

Cancellation: Refunds will be issued, less a \$50 administration fee, up until the handouts and access information are emailed.

If you have not received your handout materials 3 days prior to session, contact the Education Department.

For more info...call us at **800-572-7359** or **423-899-2425 x 1204** or **1208**

FAX: 423-899-8726 **MAIL: P.O. Box 21550, Chattanooga, TN 37424**

Sign Us Up!

**IRA Essentials
February 2, 2012**

Credit Union _____

Contact Person _____

Email Address _____

Phone _____ Fax _____

Distance Learning



Donate to the Herbert Ellison Scholarship Fund: ___ \$25 ___ \$50 ___ \$75 ___ \$100 ___ Other

Payment Method:

___ Enclosed is a share draft/check for \$ _____ payable to Tennessee Credit Union League.

___ A share draft/check for \$ _____ payable to Tennessee Credit Union League will follow.

___ I authorize Vol Corp Credit Union to debit the credit union account for \$ _____

Account #: _____ Authorized Signature: _____

(Requires prior completion of Authorization Agreement for Direct Payments [ACH Debits].)