



GENERAL BULLETIN

CONNECTICUT
BANKERS
ASSOCIATION
10 Waterside Drive
Farmington, CT 06032-3083
(860) 677-5060
FAX: (860) 677-5066

2008 - 11

January 14, 2008

TO THE CHIEF EXECUTIVE OFFICER
OR INDIVIDUAL ADDRESSED

SENT TO:

CEO, CEO+
Associate Member
Retirement Specialist

RE: IRA Essentials 2008 Seminar

We are pleased to announce a one-day workshop, **IRA Essentials 2008 Seminar**, to be held on Tuesday, March 18, 2008 at the Crowne Plaza Hotel, Cromwell, CT.

SEMINAR HIGHLIGHTS

The IRA Essentials course provides attendees with the knowledge they need to work effectively with Traditional and Roth IRAs, including the procedures that financial organizations must follow to operate a compliant IRA department. This course is designed for individuals who are new to IRAs and for those looking for a general IRA refresher. Although this course is designed as an introductory course, instructors will be happy to assist attendees with more advanced questions.

COURSE TOPICS

This seminar will teach you the fundamentals of:

- Roth and Traditional IRA plan establishment,
- contributions,
- asset portability,
- Roth and Traditional IRA distributions, and
- required reporting.

COURSE BENEFITS

After attending this course you will be able to:

- assist clients with establishing their Roth and Traditional IRAs,
- select and complete appropriate forms for IRA transactions,
- recall the contribution limits for Roth and Traditional IRAs,
- identify the role you should (and should not) play in assisting your clients as they make contributions,
- process distributions, and
- report required information to the IRA holder and to the IRS.

WHO SHOULD ATTEND

This course is designed for individuals who are new to IRAs and need to understand the basic rules that govern Roth and Traditional IRAs to conduct transactions or are looking for an updated, general refresher on IRA rules.

INSTRUCTOR

Frank LaLoggia coordinates and conducts pension and financial seminars and training programs throughout the United States. With 31 years of experience in the employee benefits area, and in great demand as a speaker, he continues to educate and enthusiastically train pension professionals at all levels of expertise.

Frank is a graduate of Northeastern University's Deferred Compensation Program, and is the past chairman of The New York State Savings Bank Association's Committee on Pension Trust Services. Before establishing his own firm, he was president of PM&F Services, a national pension consulting firm.

CONTINUING EDUCATION CREDITS

The Connecticut Bankers Association has applied to the State of Connecticut Insurance Department to obtain Continuing Education Credits for this program.

REGISTRATION

The **IRA Essentials 2008 Seminar** will be held on Tuesday, March 18, 2008 at the Crowne Plaza Hotel, Cromwell, CT from 8:30 a.m. - 4:30 p.m. The enclosed registration form should be completed and returned to the Association office no later than Thursday, March 13, 2008. You may fax your registration prior to the deadline (860.677.5066). All fax registrants will be billed regardless of their attendance.

The fee is outlined on the attached registration form and includes all program materials, luncheon, refreshments and applicable state sales tax. Should you have any questions regarding the program or registration procedures, please don't hesitate to contact me at the Association office.

Sincerely,

COLLEEN E. CLANCY
Vice President

CONNECTICUT BANKERS ASSOCIATION MEETING REGISTRATION FORM

10 Waterside Drive, Farmington, CT 06032-3083
Telephone: (860) 677-5060 Fax: (860) 677-5066



TITLE: IRA Essentials 2008 Seminar
DATE: Tuesday, March 18, 2008
REGISTRATION TIME: 8:15 a.m.
PROGRAM TIME: 8:30 a.m. - 4:30 p.m.
LOCATION: Crowne Plaza Hotel, Cromwell, CT
REGISTRATION DEADLINE: Thursday, March 13, 2008

| <u>NAME (please print)</u> | <u>TITLE</u> | <u>BADGE NAME</u> | <u>EMAIL*</u> |
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Company: _____
 Address: _____
 Completed by: _____ Phone: _____ E-mail: _____

| REGISTRATION FEES | REGISTRATION |
|---|--|
| <p>\$235.00/person x ____ Person(s) = \$ _____</p> <p>*Confirmation sent if Email address is provided above.</p> | <p>All fax registrants will be billed regardless of their attendance.</p> <p>The fee includes all program materials, luncheon, refreshments and applicable state sales tax.</p> <p>Registration fees are determined by the CBA and are non-negotiable.</p> |

Please select method of payment: Check Visa MasterCard American Express

Card Number: _____ Exp. Date: _____

Security Code: _____ (3 digits on back of card) Amount: \$ _____

Billing Address: _____

City/State/Zip: _____

Cardholder Signature: _____

~~ Please make checks payable to: Connecticut Bankers Association ~~

REFUND/CANCELLATION POLICY

- REFUNDS:** No refunds will be made for cancellations received within two business days of the program.
- CANCELLATIONS:** A \$25.00 per person cancellation fee will be charged.
- SUBSTITUTIONS:** Registrants may send a substitute to the program without loss of program fees. Please call in advance whenever possible.
- NON-ATTENDEES:** Registrants who do not attend the scheduled program will not receive a refund of program fees, but may request program materials.

DIRECTIONS TO THE CROWNE PLAZA, CROMWELL **(860) 635-2000**

- From Hartford:** I-91 South to Exit 21. Left at end of ramp. After first light, hotel located immediately on left.
- From New Haven:** I-91 North to Exit 21. Left at end of ramp. Hotel located immediately on left.
- From Waterbury/ Danbury:** I-84 East to Route 691 East. Follow to I-91 North to Exit 21. Left at end of ramp. Hotel immediately on left.
- From New Britain:** Route 72 East/Route 9 South to Route 372 East (Berlin/Cromwell). Hotel located approximately 4 miles on left.