



# GENERAL BULLETIN

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

2008 - 12

January 14, 2008

TO THE CHIEF EXECUTIVE OFFICER  
OR INDIVIDUAL ADDRESSED

SENT TO:

CEO, CEO+  
Associate Member  
Retirement Specialist

RE: Beyond The IRA Essentials: Moving IRA Assets Seminar

We are pleased to announce a one-day workshop, **Beyond The IRA Essentials: Moving IRA Assets Seminar**, to be held on Wednesday, March 19, 2008 at the Crowne Plaza Hotel, Cromwell, CT.

## SEMINAR HIGHLIGHTS

IRA professionals have different educational needs, which is why Ascensus (formerly BISYS Retirement Services) offers a series of courses titled Beyond the Essentials. Ascensus designed these seminars for IRA professionals who need current information on specific IRA topics. Beyond the Essentials: Moving IRA Assets provides detailed information on complex IRA portability issues. Individuals attending this seminar will learn more than just the basics of moving IRA assets. Attendees will study advanced issues, such as how to properly move IRA assets awarded through a divorce decree, how to move IRA assets to a health savings account (HSA), and how to roll over pretax, after-tax, and Roth assets from employer-sponsored retirement plans to Traditional and Roth IRAs. Attendees will also learn about recent legislation and how it will affect their IRA operations.

## COURSE TOPICS

- IRA Legislative Update
- Understanding and Processing Transfers and Rollovers
- Portability Between Retirement Plans and IRAs
- Conversion and Recharacterization Issues

## COURSE BENEFITS

After attending this seminar you will be able to:

- understand how to move IRA assets to an HSA,
- process rollover contributions that consist of pretax, after-tax, and designated Roth account assets,
- help your clients take advantage now of the conversion opportunities that become effective in 2010,
- determine the net income attributable (NIA) for a recharacterized contribution.

## **WHO SHOULD ATTEND**

A good understanding of IRAs is helpful when participating in this workshop. You should attend this program if you:

- deal with IRA portability issues,
- need to understand the new portability rules that become effective in 2008 and 2010,
- are responsible for educating others on portability issues, or
- have previously attended an introductory IRA course and are ready for a more in-depth study of IRA portability issues.

## **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 **Beyond The IRA Essentials: Moving IRA Assets Seminar** will be held on Wednesday, March 19, 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:** Beyond The IRA Essentials: Moving IRA Assets Seminar  
**DATE:** Wednesday, March 19, 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><b>*Confirmation sent if Email address is provided above.</b></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.