GENERAL BULLETIN

CONNECTICUT
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SENT TO:

2010 – 4

January 6, 2010

TO THE CHIEF EXECUTIVE OFFICER
OR INDIVIDUAL ADDRESSED

CEO, CEO+, Branch,
Retirement Specialists

RE: Ascensus Retirement Plans Webinar Schedule For January 2010

WHAT IS A WEB SEMINAR?

Webinar is short for web-based seminar. Typically, the webinar is transmitted over the web. But the Ascensus webinar does not require access to the Internet. If you do not have Internet access, simply follow the PowerPoint® presentation that will be emailed to you and listen in as the Ascensus retirement industry experts walk you through the details of the webinar.

All webinars are approximately 60 minutes long followed by a 30-minute Q&A. A workbook (which you may duplicate) and a PowerPoint® presentation are included, unless otherwise noted.

KEY FEATURES

- Interactive elements provide the ability to give, receive and discuss information.
- Webinars may be audibly and visually presented through connections on your computer and telephone.

BENEFITS

- No travel expense and no time away from the office for you or your staff.
- One registration fee with one phone connection allows an unlimited number of attendees to participate in the training.
- Effective, efficient, and affordable training for all areas of your organization.

JANUARY SCHEDULE

Basic IRAs -- January 28 -- 12:00 p.m.

For those who are new to IRAs or need a refresher, this webinar provides the fundamentals of Traditional and Roth IRAs. It covers IRA contributions, distributions, and portability, including the new portability rules associated with rollovers between employer-sponsored retirement plans and IRAs.

HSA Basics -- January 12 -- 2:30 p.m.

Financial organizations just entering the health savings account (HSA) market may benefit most from this webinar, which provides an overview of HSAs. Topics include required documentation and reporting, contribution rules and limits, eligibility requirements, portability rules, and the difference between qualified and nonqualified HSA distributions.

Advanced HSAs -- January 26 -- 2:30 p.m.

HSAs continue to be a hot product in the financial services industry. This webinar includes the most current information on HSAs, including contribution limits, comparability rules for employer contributions, distribution rules and issues, and reporting requirements.

QRP Beneficiary Rollovers to Inherited IRAs -- January 14 -- 12:00 p.m.

Recent IRS guidance allows beneficiaries of 401(a) and 403(a) qualified retirement plans, 457(b) governmental plans, and 403(b) plans to roll over inherited plan assets to inherited IRAs. This provides favorable options for beneficiaries and a new source of IRA rollover assets for financial organizations. This webinar discusses the operational and compliance concerns related to rollovers from employer-sponsored retirement plans to inherited IRAs.

REGISTRATION INFORMATION

One registration fee per dial-in connection allows an unlimited number of participants to attend the webinar. Each webinar includes a workbook, PowerPoint® presentation, web conference access, and a question-and-answer session. One week before the webinar, you will receive an instructional email detailing connectivity and webinar functionality. As an attendee, you may access the archived webinar free of charge for 10 business days or you may purchase the recorded webinar on CD for $100.

Individual webinars	$295 per dial-in connection
Package #1:	5 webinars Only $1,255 Save $220!
Package #2:	10 webinars Only $2,525 Save $425!
Certification Package:	22 webinars Only $4,582 Save $1,908!

TO REGISTER

#1 Visit the training calendar at www.ascensus.com and register online.
#2 Complete the Registration Order Form provided and fax to (218) 825-5010.
#3 Call an Ascensus Customer Service Representative at (800) 346-3860, option 2.
#4 Mail the completed Registration Order Form to: Education Department, Ascensus, P.O. Box 979, Brainerd, MN 56401.

Should you have any questions, please don't hesitate to contact the CBA.

Very truly yours,

COLLEEN E. CLANCY
Vice President

2010 Ascensus Webinar Registration/Order Form

Please check the box(es) of the webinar dates and/or CD(s) you have chosen.

Basic IRAs ❑ January 28 ❑ April 8 ❑ July 20 ❑ October 5 ❑ CD	**Traditional IRA Distributions** ❑ May 4 ❑ August 17 ❑ CD	**Individual(k) Plans** ❑ February 23 ❑ October 7 ❑ CD
Conversions and Recharacterizations ❑ March 11 ❑ September 16 ❑ CD	**Withholding** ❑ February 4 ❑ October 14 ❑ CD	**Introduction to 401(k) Plans** ❑ May 20 ❑ October 28 ❑ CD
Direct Rollovers and Other Portability Issues ❑ September 9 ❑ December 9 ❑ CD	**72(t) Payments** ❑ September 23 ❑ December 14 ❑ CD	**Introduction to Qualified Retirement Plans** ❑ May 18 ❑ September 2 ❑ CD
Establishing and Amending IRAs ❑ March 30 ❑ November 16 ❑ CD	**Advanced HSAs** ❑ January 26 ❑ April 27 ❑ July 22 ❑ October 28 ❑ CD	**Introduction to Qualified Retirement Plan Distributions** ❑ February 2 ❑ July 29 ❑ CD
HSA Basics ❑ January 12 ❑ February 9 ❑ July 15 ❑ October 19 ❑ CD	**Comparing Roth and Traditional IRAs** ❑ March 23 ❑ August 5 ❑ CD	**SIMPLE Plans** ❑ March 16 ❑ September 21 ❑ CD
IRA Beneficiary Distributions ❑ February 2 ❑ June 10 ❑ August 12 ❑ November 4 ❑ CD	**Conducting Your Own Compliance Audit** ❑ February 18 ❑ June 22 ❑ CD	**SEP Plans** ❑ February 25 ❑ August 3 ❑ CD
IRA Contributions ❑ March 4 ❑ September 28 ❑ CD	**Coverdell Education Savings Accounts** ❑ April 6 ❑ August 5 ❑ CD	**403(b) Plans** ❑ March 18 ❑ August 24 ❑ CD
IRA Frontline Fundamentals – Part 1 ❑ February 9 ❑ October 21 ❑ CD	**Handling IRA Legal Issues** ❑ May 13 ❑ September 14 ❑ CD	**QRP Beneficiary Rollovers to Inherited IRAs** ❑ January 14 ❑ March 2 ❑ June 17 ❑ CD
IRA Frontline Fundamentals – Part 2 ❑ February 11 ❑ October 26 ❑ CD	**IRA Excess Contributions** ❑ April 20 ❑ September 30 ❑ CD	**Roth 401(k)/403(b) Provision** ❑ June 15 ❑ December 2 ❑ CD
IRA Required Minimum Distributions ❑ March 9 ❑ August 10 ❑ December 7 ❑ CD	**IRA Reporting** ❑ April 22 ❑ November 2 ❑ November 23 ❑ December 2 ❑ CD	**Retirement Distribution and Income Planning** ❑ February 25 ❑ July 27 ❑ CD
Roth IRA Distributions ❑ May 11 ❑ November 18 ❑ CD	**Understanding and Processing Transfers and Rollovers** ❑ March 25 ❑ July 13 ❑ CD	

Name of Webinar Attendee ____

Email (required) ____

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# of Webinars _____ # of CDs _____ ❑ Package #1 (5) ❑ Package #2 (10) ❑ Certification Package (22)

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