



GENERAL BULLETIN

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

SENT TO:

2010 – 18

February 9, 2010

TO THE CHIEF EXECUTIVE OFFICER
OR INDIVIDUAL ADDRESSED

CEO, CEO+, Branch,
Retirement Specialists

RE: Ascensus Retirement Plans Webinar Schedule For February 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.

FEBRUARY SCHEDULE

- IRA Frontline Fundamentals – Part 1 -- February 9
- IRA Frontline Fundamentals – Part 2 -- February 11
- Conducting Your Own Compliance Audit -- February 18
- Individual(k) Plans -- February 23
- Retirement Distribution and Income Planning -- February 25

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 Colleen Clancy at the CBA.

2010 Ascensus Webinar Registration/Order Form

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

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

Name of Webinar Attendee _____

Email (required) _____

Client No. (from mailing label, required) _____ Source Code 458

Organization _____

Street Address _____ (No P.O. Box.)

City _____ State _____ Zip _____ Phone (____) _____

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

Please Invoice Me Payment Enclosed \$ _____ (Amount Enclosed)

Fax To: (218) 825-5010

Sales tax may be applicable, either now or in the future, to the products or services provided by Ascensus under the terms of this agreement, and such sales tax will be in addition to the fees set forth herein. Refund policy: If you cancel two days before the date of your webinar, Ascensus will issue a credit (less a \$35 processing fee), that you may apply to another Ascensus webinar within the next 12-month period.