



# GENERAL BULLETIN

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

SENT TO:

2010 – 36

February 25, 2010

TO THE CHIEF EXECUTIVE OFFICER  
OR INDIVIDUAL ADDRESSED

CEO, CEO+  
Marketing, Retirement

RE: Ascensus Retirement Plans Lobby Brochures

With the busy retirement plans season upon us, now is the time for member banks to check their lobby brochure inventory. Ascensus, the CBA preferred vendor for IRA and retirement plan products and solutions, has created a special lobby brochure flyer which highlights all of Ascensus' available brochures, which include:

- #625 Roth IRA Conversions: Doors Open Wide to Roth IRAs - **NEW!**
- #640 QRP Distributions: Is Your Rainy Day Here? - **NEW!**
- #642 Employer-Sponsored Retirement Plan Rollovers: Rolling Your Way to a Better Retirement - **NEW!**
- #654 Transitioning Into Retirement: Plan Your Trip to Retirement - **NEW!**
- #655 Health Savings Accounts for Employers: Economical Health Care Option for Your Employees - **NEW!**
- #603 Roth IRA vs. Traditional IRA: Exploring Which Type of IRA Is Right for You
- #605 SIMPLE IRA Plans for Small Employers: Ready to Live the SIMPLE Life?
- #607 Roth IRAs: Reel in Your Retirement Savings With a Roth IRA
- #609 Coverdell Education Savings Accounts: Help Your Child Reach for the Stars
- #610 403(b) Plans: Does Saving for Retirement Feel Like an Uphill Battle?
- #612 Inheriting an IRA: Contemplating Your Beneficiary Distribution Options
- #613 Understanding IRA Distributions: Decoding the Maze of IRA Distributions
- #621 Traditional IRAs: Start Planting Your Garden of Savings the Traditional Way
- #622 SEP Plans: Securing Your Retirement One SEP at a Time
- #628 Choosing a Retirement Plan: Don't Leave Your Retirement to Chance
- #629 Transfers, Rollovers, & Conversions: Moving Money Between Your IRAs is a Walk in the Park
- #630 Self-Directed IRA Investments: How Are You Investing in Your Future?
- #632 Catch-Up Contributions: With Retirement Just Ahead, Catch-Up on Retirement Saving
- #647 Individual(k) Plans: Branching Out on Your Own
- #648 Required Minimum Distributions: Stretch Your Retirement Savings With Required Minimum Distributions
- #651 Health Savings Accounts for Individuals: Concerned About Rising Health Care Costs?
- #653 Roth 401(k) Plans: Sprint Toward Retirement With the Roth 401(k)

These brochures are available at a special 10% discount to all CBA members. To assist our members, there are four ways to order (please see the accompanying brochure for more details). Should you have any questions, please don't hesitate to contact me at the CBA.

Sincerely,

COLLEEN E. CLANCY  
Vice President



# Four easy ways to order

1. Call an Ascensus representative at 800-346-3860, option 3
2. Email RPS Sales at sales.support@ascensus.com
3. Complete and fax this form to 218-825-5012
4. Complete and mail this form to Ascensus RPS Sales, P.O. Box 979, Brainerd, MN 56401



Product #	Brochure Title		Quantity	Price	Choose one
#625	Roth IRA Conversions: Doors Open Wide to Roth IRAs	<b>NEW!</b>			<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#640	QRP Distributions: Is Your Rainy Day Here?	<b>NEW!</b>			<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#642	Employer-Sponsored Retirement Plan Rollovers: Rolling Your Way to a Better Retirement	<b>NEW!</b>			<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#654	Transitioning Into Retirement: Plan Your Trip to Retirement	<b>NEW!</b>			<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#655	Health Savings Accounts for Employers: Economical Health Care Option for Your Employees	<b>NEW!</b>			<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#603	Roth IRA vs. Traditional IRA: Exploring Which Type of IRA Is Right for You				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#605	SIMPLE IRA Plans for Small Employers: Ready to Live the SIMPLE Life?				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#607	Roth IRAs: Reel in Your Retirement Savings With a Roth IRA				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#609	Coverdell Education Savings Accounts: Help Your Child Reach for the Stars				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#610	403(b) Plans: Does Saving for Retirement Feel Like an Uphill Battle?				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#612	Inheriting an IRA: Contemplating Your Beneficiary Distribution Options				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#613	Understanding IRA Distributions: Decoding the Maze of IRA Distributions				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#621	Traditional IRAs: Start Planting Your Garden of Savings the Traditional Way				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#622	SEP Plans: Securing Your Retirement One SEP at a Time				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#628	Choosing a Retirement Plan: Don't Leave Your Retirement to Chance				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#629	Transfers, Rollovers, & Conversions: Moving Money Between Your IRAs Is a Walk in the Park				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#630	Self-Directed IRA Investments: How Are You Investing in Your Future?				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#632	Catch-Up Contributions: With Retirement Just Ahead, Catch Up on Saving				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#647	Individual(k) Plans: Branching Out on Your Own				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#648	Required Minimum Distributions: Stretch Your Retirement Savings With Required Minimum Distributions				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#651	Health Savings Accounts for Individuals: Concerned About Rising Health Care Costs?				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
#653	Roth 40(k) Plans: Sprint Toward Retirement With the Roth 401(k)				<input type="checkbox"/> Stock <input type="checkbox"/> Imprinted
<b>Totals</b>					

## Imprinting Instructions:

Line 1 \_\_\_\_\_  
 Line 2 \_\_\_\_\_  
 Line 3 \_\_\_\_\_  
 Line 4 \_\_\_\_\_

### All #600-Series Brochures

4-Color 3½ x 8½

QUANTITY	100	500	1M	5M**
Nonimprint	\$34	\$135	\$260	\$240/M
Imprinted	—	\$260	\$460	\$390/M

Imprinting includes up to four lines of type (black ink).

\*\*Additional quantities are available at a reduced fee.

## BILL TO

Organization: \_\_\_\_\_  
 Attention: \_\_\_\_\_  
 Street Address: \_\_\_\_\_  
 P.O. Box: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_

## SHIP TO *(Provide if different than "Bill To" address.)*

Organization: \_\_\_\_\_  
 Attention: \_\_\_\_\_  
 Street Address: \_\_\_\_\_  
 \_\_\_\_\_  
*(We cannot ship to a P.O. box.)*  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_

Sales tax may be applicable, either now or in the future, to the products or services provided under the terms of this agreement, and such sales tax will be in addition to the fees set forth herein.