

2009 IRA SEMINAR TOUR *Fall*



IRA ESSENTIALS

Our *IRA Essentials* seminar is one of our most popular seminars. Each year thousands of IRA professionals attend this seminar to enhance their knowledge of Traditional and Roth IRAs—including the latest information on IRA portability, beneficiary, and reporting rules. Our experienced instructors use classroom instruction, multimedia presentations, and real-life examples to create an ideal learning environment for attendees. This seminar is designed to teach IRA fundamentals to individuals who are new to the retirement industry or who need a general IRA refresher. Although the *IRA Essentials* seminar is an introductory course, our instructors will assist attendees with more advanced questions.

ADVANCED IRAS: COMPLIANCE ISSUES

During this challenging economy and time of uncertain profits, it is more important than ever for individuals and companies to protect the future growth of their retirement assets. With over \$17 trillion dollars in U.S. retirement assets at stake, IRA professionals must understand the complex compliance issues associated with IRAs. This course will explore the origins of compliance and the dramatic impact that noncompliance may have on your financial organization and on your clients. We will delve into the three major compliance topics: opening documents, withholding, and reporting. We also will discuss more complex IRA issues, such as paying IRS penalties, allowing minors to establish IRAs, moving assets due to divorce, and applying a power of attorney to IRA assets.

This course is intended for those with a working knowledge of IRA transactions, those overseeing IRA operations, and those responsible for IRA reporting and records management.



SEMINAR
DATES AND
LOCATIONS →

ASCENSUS SEMINAR DATES AND LOCATIONS

Ascensus continues to bring unmatched industry training to IRA professionals.
Look for a location near you and register early. . . space is limited.

Arizona

Scottsdale

<i>IRA Essentials</i>	Sept. 29
<i>Advanced IRAs</i>	Sept. 30

California

Ontario

<i>IRA Essentials</i>	Dec. 8
<i>Advanced IRAs</i>	Dec. 9

San Francisco

<i>IRA Essentials</i>	Sept. 24
<i>Advanced IRAs</i>	Sept. 25

Sherman Oaks

<i>IRA Essentials</i>	Sept. 22
<i>Advanced IRAs</i>	Sept. 23

District of Columbia

Arlington, VA

<i>IRA Essentials</i>	Oct. 27
<i>Advanced IRAs</i>	Oct. 28

Florida

Orlando

<i>IRA Essentials</i>	Dec. 9
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Miami

<i>IRA Essentials</i>	Dec. 11
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Naples

<i>IRA Essentials</i>	Dec. 10
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Georgia

Atlanta

<i>IRA Essentials</i>	Nov. 5
<i>Advanced IRAs</i>	Nov. 6

Iowa

Mason City

<i>IRA Essentials</i>	Sept. 22
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Kansas

Overland Park

<i>IRA Essentials</i>	Nov. 3
<i>Advanced IRAs</i>	Nov. 4

Louisiana

New Orleans

<i>IRA Essentials</i>	Dec. 8
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Maryland

Baltimore

<i>IRA Essentials</i>	Oct. 29
<i>Advanced IRAs</i>	Oct. 30

Massachusetts

Boston

<i>IRA Essentials</i>	Oct. 8
<i>Advanced IRAs</i>	Oct. 9

Michigan

Lansing

<i>IRA Essentials</i>	Oct. 28
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Minnesota

Brainerd/Baxter

<i>IRA Essentials</i>	Sept. 16
<i>Advanced IRAs</i>	Sept. 17

Minneapolis

<i>IRA Essentials</i>	Sept. 23
<i>Advanced IRAs</i>	Sept. 24

Ohio

Cincinnati

<i>IRA Essentials</i>	Nov. 18
<i>Advanced IRAs</i>	Nov. 19

Toledo (Perrysburg)

<i>IRA Essentials</i>	Nov. 17
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Oklahoma

Oklahoma City

<i>IRA Essentials</i>	Oct. 13
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FOR MORE
INFORMATION, AND TO
REGISTER, PLEASE VISIT
WWW.ASCENSUS.COM OR
CALL US AT 800-346-3860.

Oregon

Portland

<i>IRA Essentials</i>	Oct. 21
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Salem

<i>IRA Essentials</i>	Oct. 20
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Pennsylvania

Harrisburg

<i>IRA Essentials</i>	Oct. 6
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Philadelphia

<i>IRA Essentials</i>	Oct. 7
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Texas

Dallas (Arlington)

<i>IRA Essentials</i>	Oct. 15
<i>Advanced IRAs</i>	Oct. 16

San Antonio

<i>IRA Essentials</i>	Oct. 14
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Wisconsin

Appleton

<i>IRA Essentials</i>	Sept. 15
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Eau Claire

<i>IRA Essentials</i>	Sept. 17
<i>Advanced IRAs</i>	Sept. 18

Madison (Middleton)

<i>IRA Essentials</i>	Oct. 13
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Milwaukee

<i>IRA Essentials</i>	Oct. 14
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Stevens Point

<i>IRA Essentials</i>	Sept. 16
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Ascensus Seminar Schedule

8:00-8:30 a.m. – Seminar registration and continental breakfast

8:30 a.m. – Seminar begins

11:45 a.m. – Lunch on your own

1:00 p.m. – Seminar resumes

4:15 p.m. – Seminar concludes

Affordable Fees

	1st Attendee	Additional Attendee
<i>IRA Essentials</i>	\$199	\$180
<i>Advanced IRAs</i>	\$199	\$180