MAINE ASSOCIATION OF COMMUNITY BANKS

IRA Regulatory Update & Review

Tuesday, January 12, 2010
3:00 pm – 4:30 pm Eastern

WEBINAR – ON-DEMAND WEB LINK – FREE CD ROM

IRAs continue to evolve and change, so it's important to know the regulatory issues, changes, and guidelines that will directly impact your customers during the current tax year and the year ahead. ***This webinar is not for beginners;*** it is designed for experienced IRA professionals. This fast-paced program will review new and hot IRA issues, including reporting changes/issues that impact both your bank and your customers (e.g. dealing with distributions and the 2009 "skip" on required minimums where the customer creates their own distribution schedule). **Don't miss this complete update for 2009-2010 tax seasons!**

HIGHLIGHTS

- Roth conversion income restrictions lifted in 2010
- Non-spouse beneficiaries rollover of Qualified Retirement Plans to individual IRAs
- Changes to 5498 reporting instructions
- Clarification on contributions of military death gratuities to Coverdell ESAs
- New adjustments and numbers for 2010
- How to handle an IRA to HSA trustee-to-trustee transfer
- Direct rollovers from qualified plans to Roth IRAs
- Age 70 ½ and death distributions.

WHY SHOULD YOU PARTICIPATE?
This session is a cost-effective way to train/update your frontline and IRA staff on IRA changes for the 2009-2010 tax years. You may train as many individuals as you like for one set price. There will be no travel costs, no time lost from work, and no one will be required to leave the institution.

WHO SHOULD ATTEND?
This informative session is would best suit IRA administrators, IRA coordinators, supervisors, trainers and frontline staff who open IRAs. **It is not designed for beginners**.

PLEASE NOTE: Your registration fee allows you to have one telephone connection. However, as many people as you like may listen from your office speaker phone. If you register for the webinar, your registration fee also includes one internet connection from a single computer terminal.

ABOUT THE PRESENTER – Deborah L. Crawford, gettechnical inc.
Deborah Crawford is the President of gettechnical inc., a Baton Rouge-based firm, specializing in the education of financial institutions across the nation. Her 20+ years of experience began at Hibernia National Bank in New Orleans. She graduated from Louisiana State University with both her bachelor's and master's degrees. Debbie specializes in the education of financial institution employees and officers in the area of deposit account laws, new account documentation, insurance, complex compliance regulations and IRAs.

REGISTRATION FORM

Mail Your Registration Form To:
Maine Association of Community Banks
489 Congress Street
Portland, ME 04101-3430

Fax Your Registration Form To:
207.774.5693

E-Mail Your Registration Form To:
grayd@mecb.com

MAINE ASSOCIATION OF COMMUNITY BANKS

EDUCATIONAL PROGRAMS

LIVE WEBINARS – ON-DEMAND WEB LINKS – FREE CD ROMS

JANUARY 2010

PROGRAM INFORMATION

- ☐ **Jan 5: Docs - Retention & Destruction Guidelines**
- ☐ **Jan 7: Stressing Capital & Capital Contingency**
- ☐ **Jan 12: IRA Regulatory Update & Review**
- ☐ **Jan 14: Regulatory Hot Buttons in 3rd Party Selection & Management**
- ☐ **Jan 20: Robbery Awareness for All Bankers**
- ☐ **Jan 21: Director Series: Compensation Design**
- ☐ **Jan 26: Frontline *Skillworks:* Top10 Reasons - FDIC Ins.**
- ☐ **Jan 28: CRA Performance: Meeting Examiner Expectations**

PROGRAM DELIVERY OPTIONS

MEMBER	NON-MEMBER	DELIVERY OPTIONS *(NEW)*
☐ 215.00	☐ 315.00	**Live Webinar License** (Includes connection codes for (1) telephone audio connection plus (1) internet connection for visuals
☐ 215.00	☐ 315.00	**On-Demand Web Link & CD Rom** (recording of the live webinar including audio, visuals, handouts & presenter's e-mail address - available 5 days following live webinar date for 6 months – plus free CD Rom)
☐ 323.00	☐ 423.00	**Both Live Webinar & On-Demand Web Link (includes free CD Rom)** (Combines the above options)

PROGRAM REGISTRATION

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For more information, please call Drinda Gray at Maine Association of Community Banks at 207.791.8400

Electronic registration files may be e-mailed to grayd@mecb.com