

Advanced IRAs

360 minutes (6 hours)



IRA Update – 30 minutes

- Explain recent changes affecting IRA owners
- Recognize how recent changes may affect your financial organization

Amending IRA Documents – 30 minutes

- Identify recent amendment guidance
- Define plan agreement and disclosure statement amendment procedures
- Describe a universal or “catch-all” amendment
- List the amendment need for mergers, acquisitions, and forms provider changes

Required Minimum Distributions – 60 minutes (1 hour)

- Calculate a required minimum distribution (RMD)
- Discuss the RMD rules
- Explain the RMD reporting requirements

Beneficiary Options – 150 minutes (2 hours and 30 minutes)


- Describe beneficiary distribution options when an IRA owner dies on or after January 1, 2020
- Recognize the differences for the various beneficiary types

Advanced Portability – 45 minutes

- Summarize the restrictions on the movement between IRAs
- Describe a conversion
- Explain the effect of withholding on a conversion
- Recognize the portability options available when moving from an employer-sponsored retirement plan to an IRA

Finding Answers to Commonly Asked IRA Questions – 45 minutes

- Review commonly asked IRA questions
- Learn about the resources available to find answers

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