

CENTER FOR FINANCIAL TRAINING & EDUCATION ALLIANCE

Presents

ASCENSUS IRA Training and Certification IRA Essentials OnDemand and IRA University

With more than 35 years of experience, Ascensus offers tailored solutions that meet the needs of asset managers, banks, credit unions, state governments, financial professionals, employers, and individuals.

IRA Essentials OnDemand

IRA Essentials OnDemand is the perfect solution for those who need an introduction to IRAs but cannot attend a face-to-face training session. IRA reference materials, job aids, quizzes and videos blend together to create an immersive educational experience. Explore six educational tracks: Introduction to IRAs, Establishing an IRA, Funding, Portability, IRA Distributions and Reporting.

Who Should Attend

You should attend if you

- need to learn the basics of Traditional and Roth IRAs
or
- want an updated, general refresher on IRA rules.

The best part?

This convenient educational opportunity is available 24/7, on-demand, wherever you need it.

Registration Fee

Registration is just \$249/user and includes unlimited access for 30 days to all educational tracks and course materials.



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IRA University

IRA University is a six-week course that provides attendees with a solid foundation of IRA knowledge through a combination of interactive weekly webinars and eLearning modules. IRA University graduates emerge with confidence in their ability to handle common IRA transactions.

After the "Getting Started" kickoff webinar, each week consists of a self-paced *eLearning* module (45 minutes - 1 hour) followed by a 90-minute interactive webinar (Wednesdays, 2:00 pm ET) to help participants apply their knowledge from the *eLearning* module. After completing *IRA University*, attendees have the opportunity to earn their Certified IRA Specialist I (CIS I) designation for no additional cost.

Attaining the CIS I designation will help fulfill your career and give your financial organization's IRA owners the peace of mind that comes from working with a professional IRA representative.

Registration Fee

Your investment for the full six-week *IRA University* is

First Attendee	\$1,199
Each Additional Attendee	\$1,099

***Your registration fee includes the CIS I exam -
an added value of \$275!***

IRA University Session Dates

October 3 - November 7, 2018

February 27, 2019 – April 3, 2019

May 1, 2019 – June 5, 2019

July 10, 2019 – August 4, 2019

October 2, 2019 – November 6, 2019

*Live weekly webinars will be Wednesdays at 2:00 EST, recordings also available upon request.



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REGISTRATION FORM: ASCENSUS IRA TRAINING and CERTIFICATION

Name: _____ Last Four Digits of SS#: _____

eMail address: _____ Telephone #: _____

Job Title: _____

Financial Institution Name and Address: _____

Authorization: _____

Authorizer's eMail Address: _____ Telephone #: _____

Please choose the program you would like to enroll in:

____ IRA Essentials OnDemand

Registration is just \$249/user and includes unlimited access for 30 days to all educational tracks and course materials.

____ IRA University

Registration is \$1,199 for First Attendee and \$1,099 for Each Additional Attendee.

Your registration fee includes the CIS I Exam - an added value of \$275

Register Online at: WWW.CFTEA.ORG

You may scan/email your registration to: info@cftea.org

You may FAX your registration form to: 207-514-8260

Questions?

Call 1-888-366-3242 or 207-688-6225 Email us at info@cftea.org

CFTEA is committed to offering professional continuing education programs in partnership with area Financial Institutions and their employees. We value and deliver a high standard of cost effective educational programs while promoting personal growth through professional development.

The Center for Financial Training reaffirms its standing policy of nondiscrimination in employment and in all programs and activities with respect to race, creed, color, sex, sexual orientation, age, religion, ethnic or national origin, handicap or veteran status.