



Instructor: Matthew Cyr



IRA ADVANCED COURSE #: C5016L

MULTIPLE LOCATION SESSIONS FROM 9:00 AM—2:30 PM

course description

This workshop takes an in-depth look at some of the more challenging issues facing the retirement plan industry today. For example, you will learn how to properly amend IRA documents, avoid converting or rolling over ineligible assets, establish separate accounting by the required deadline, and meet the IRS reporting requirements. You also will receive current information on any legislative changes affecting the retirement plan industry.

how to enroll

Enrollment must be received at least one week prior to the start date of the class. Enroll online at our website, CFTEA.org or with the enrollment form on this flyer.

how class works

Attend this class at any of our four locations to interact with peers and our experienced notary author, Alfred Piombino for one-on-one questions and best practices.

tuition

\$295 per participant. Lunch and materials included.

withdrawal policy

CFTEA withdrawal policy is outlined within our latest catalog and on our website. Enrollment may be transferred to another student prior to class start.

Registration Form

Name: _____

Last Four Digits of SS#: _____

Email used for Course:

Telephone #: _____

Organization and Mailing Address:

March 13, 2019—Wells, Maine

April 3, 2019—Hampton, New Hampshire

Authorized by: _____

Detailed course descriptions located at cftea.org under Course Descriptions— Professional Skills & Special Topics.

Register online at CFTEA.org

Scan registration form to info@cftea.org or

FAX to: 207.514.8260

Questions? Call 888.366.3242