26 IRA SEMINARS

OBA MEMBERS: REGISTER ONLINE AT WWW.OBA.COM.

IRA Basic- $290 IRA Update-$290 or both days $560 (same attendee)

Non-member rate is $600 per day

The fee is per person and includes instruction, materials, breaks and lunch.

Each day can be attended independently but for the most comprehensive learning, attending both days is recommended. The same book will be used for both days.

Mark which program(s) you plan to attend.

TULSA	**OKC**
☐ IRA Basics Nov. 3	☐ IRA Basics Nov. 5
☐ IRA Update Nov. 4	☐ IRA Update Nov. 6
☐Tulsa Basic & Update	☐ OKC Basic & Update

BANK/CO. ______________________________

PHONE ________________________________

FAX ___________________________________

P.O. BOX ______CITY ____________________

ZIP ________________

NAME _________________________________

TITLE ________________________________

EMAIL ________________________________

NAME _________________________________

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EMAIL ________________________________

NAME _________________________________

TITLE ________________________________

EMAIL ________________________________

PAY BY CREDIT CARD:

For security reasons, please e-mail your registration form and credit card information to:

secure e-mail: secure@oba.com

BILL TO ☐ VISA ☐ MASTERCARD ☐ AMEX ☐ DISCOVER

CARDHOLDER NAME____________________

CARD # ________________________________

EXPIRATION DATE ____________ CVC# ____

SIGNATURE____________________________

PAY BY CHECK:

Mail this form with payment to:

Oklahoma Bankers Association
P.O. Box 960173
Oklahoma City, OK 73196-0173

SCHEDULE

8:30 a.m.	Registration
9 a.m. to 4 p.m.	Basic Program
9 a.m. to 3 p.m.	Update Program

LOCATIONS

November 3 & 4 Renaissance Tulsa Hotel & Convention Center
6808 South 107th East Avenue, Tulsa
918-307-2600

November 5 & 6 Harris Event Center at the OBA
643 N.E. 41st St., Oklahoma City
405-424-5252

ACCOMMODATIONS

Tulsa
Renaissance Tulsa Hotel & Convention Center
6808 South 107th East Avenue, Tulsa
918-307-2600

Oklahoma City
Residence Inn Bricktown
400 E. Reno Ave.
Oklahoma City, OK 73104
405-601-1700
When prompted use option 0 to get the rate of $124
Free breakfast, Self parking $23/day.

Embassy Suites, OKC Medical Center
741 N Phillips Ave
405-239-3900
Ask for the OBA business rate of $154
Made to order breakfast, Self parking $22/day

* Hotel Rates are Subject to Change*

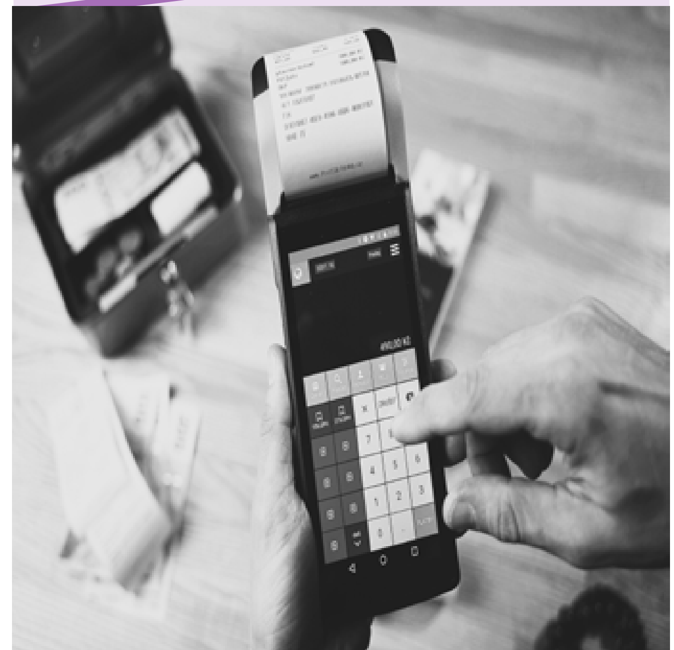
QUESTIONS?

Call Niki, Debbie or Janis at the OBA for further information at 405-424-5252, or email Janis at janis@oba.com.

If you have a disability that may impact your participation in this event, please forward a statement regarding any special needs to the OBA.

OKLAHOMA BANKERS ASSOCIATION

2026 IRA Seminars



NOV 3 & 4 |TULSA

RENAISSANCE TULSA HOTEL & CONVENTION CENTER

NOV 5 & 6 |OKC

OBA/HARRIS EVENT CENTER

ABOUT THE PROGRAM

IRA providers continue to adjust their procedures, forms, and communications to comply with a multitude of substantive changes in recent years. These changes affect nearly every aspect of IRA administration, including eligibility, funding, withholding, reporting, required minimum distributions, and inherited IRA distributions. And the IRS continues to issue guidance on these changes. So, staying compliant while aiming at a moving target is the goal.

Keeping abreast of these changes—while not always easy—is crucial to running a compliant IRA program. These courses can help! Convergent Retirement Plan Solutions' staff prides itself on digging into the rules for you and helping make them more understandable. You will receive an IRA Reference Manual, a copy of the instructor's presentation for each day for which you register, and relevant job aids that summarize the rules.

WHO SHOULD ATTEND

Everyone who is involved with IRA establishment, operations, and compliance. Whether you are looking to gain basic knowledge of IRAs, raise your comfort level, or sharpen your understanding of the rules and regulations, this two-day offering will cover it all. Even if you are brand new to IRAs, attending the IRA Basics session can help you learn and retain critical concepts.

These courses offer something for all IRA professionals, from new hires to seasoned IRA pros.

- New account representatives,
- Certificate of deposit personnel,
- Savings counselors,
- Accountholder service representatives,
- Investment and trust personnel,
- Compliance officers, and
- Any other officers/managers who oversee IRA operations.

Please join us for one or both sessions!

SPEAKER

Convergent Retirement Plan Solutions, LLC is a nationally recognized consulting/training firm that is laser focused on the compliance challenges facing IRA providers. Often referred to as "the expert's expert," Convergent's team members are subject matter experts (SMEs) in the truest sense of the word. Convergent RPS and Sunwest Training have enjoyed a successful relationship for the last 9 years and have recently merged to form a strategic partnership to provide the highest quality IRA training. Loni Porta will lead the sessions.

SCHEDULE

Day One – IRA Basics (9 a.m. - 4 p.m.) Nov. 3 & 5

Join us for the IRA Basics course for a broad overview of IRAs and the associated rules. This course is perfect for those new to IRAs—and is a helpful refresher and update for those needing to "unlearn" some old rules because of the many recent changes. During day one, we'll provide you with a solid foundation of the basic IRA rules, both old (if still applicable) and new. We'll also give a summary of the rules surrounding Health Savings Accounts (HSAs).

- Introduction to IRAs
- Establishing IRAs
- IRA contributions
  - Traditional
  - Roth
  - Reporting and statements
- IRA owner distributions
  - Traditional (including required minimum distributions (RMDs)
  - Roth
  - Reporting and statements
- Inherited IRA fundamentals
- IRA-to-IRA transfers and rollovers
- Employer plan-to-IRA rollovers
- Overview of Health Savings Accounts

Day Two – IRA Update (9 a.m. - 3 p.m.) Nov. 4 & 6

During day two, we move more quickly. We review recent changes and point out rule changes that appear imminent. We'll also focus on issues that may create errors, which can create stress for you and your staff. After thoroughly examining the new rules and their impact on IRA owners, beneficiaries, and providers, we'll discuss concrete steps your financial organization can take to help ensure ongoing compliance and top-notch customer service. We've built in time for attendees to share their real-life scenarios with clients and will work through them together during the sessions. We also allow ample time to discuss concerns that trip you up the most.

- Legislative and regulatory update
- Tackling Inherited IRAs
  - Best practices upon an IRA owner's death
  - Understanding the options available to IRA beneficiaries
  - Spouse beneficiary decisions and factors that affect their choices
  - Overview of trust beneficiaries
  - Discussion of industry best practices (forms, client communications, policies, and procedures)
- Portability deep-dive
  - IRA-to-IRA transfers and rollovers
  - Employer plan-to-IRA rollovers
  - Roth IRA conversions
- Plan document compliance
  - Amendment overview
  - Updating documents for newly established IRAs
  - Amending existing IRAs
- IRS and IRA owner reporting and withholding
  - Review reporting models
  - Electronic reporting: from FIRE to IRIS
  - Reporting corrections
  - Withholding requirements
- Miscellaneous compliance issues
  - Beneficiary disclaimers
  - IRA escheatment and "missing" IRA owners and beneficiaries
  - Powers of attorney
  - Basic estate planning concepts

Feel free to bring copies of your plan establishment kit and transaction forms.