

2026 IRA Essentials Seminar

Presented by: Ascensus

March 10— Storm Lake

March 11 — Johnston

March 12— Cedar Rapids

IRA Essentials gives attendees a solid foundation of IRA knowledge. Exercises are included throughout the day to help participants apply information to job-related situations. Attendees will leave this session able to work with IRA owners and process basic IRA transactions with confidence. This is a beginner's session; no previous IRA knowledge is assumed.

Course Topics

- IRA Distributions
 - Identify federal income tax withholding requirements
 - Recognize the exceptions to the early distribution penalty tax
- IRA Portability
 - Differentiate between a rollover and a transfer
 - Recognize rollovers between IRAs and employer-sponsored retirement plans
- Introduction and Establishing IRAs
 - Identify the tax differences of Traditional and Roth IRAs
- IRA Funding
 - Compare and contrast Traditional and Roth IRA eligibility requirements

Who Should Attend?

You should attend this seminar if you need to learn the basics of Traditional and Roth IRAs or want an updated, general refresher on IRA rules.

REGISTRATION

Registration Fee:

\$275 – IBA Member (*per person*)

\$550 – IBA Non-member (*per person*)

Registration Includes:

Continental breakfast, program materials, lunch, refreshment breaks.

Cancellation Policy:

Refunds will be made if requested one week prior to seminar date. No refunds after that date. Substitutions allowed at any time prior to seminar date.

Register online:

www.iowabankers.com
(Events tab – scroll to date)

Or mail registration form with payment to:

Iowa Bankers Association,
Attn: Registrar, PO Box 6200,
Johnston, IA 50131

For online registration and information about additional IBA training and development see www.iowabankers.com

IBA Event Code #481

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☐ Storm Lake – March 10 ☐ Johnston – March 11 ☐ Cedar Rapids – March 12

Bank _____

1. Name _____

Address _____

Email _____

City _____ State _____ ZIP _____

2. Name _____

Phone _____

Email _____

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About the Speaker

Ascensus is the largest independent retirement and college savings services provider in the United States, helping over 7 million Americans save for the future. With more than 35 years of experience, the firm partners with financial institutions to offer tailored solutions that meet the needs of financial professionals, employers, and individuals. Ascensus specializes in recordkeeping, administrative, and program management services, supporting over 40,000 retirement plans and 3.5 million 529 college savings accounts. It also administers more than 1.5 million IRAs and health savings accounts and is home to one of the largest ERISA consulting teams in the country. For more information about Ascensus, visit www.ascensus.com.

Agenda

8:30 a.m.	Registration & Continental Breakfast
9:00 a.m.	Program
Noon	Lunch
1:00 p.m.	Program
4:00 p.m.	Adjourn

Special Needs

If you need accommodations for a disability or a dietary restriction, please contact Hannah Sloan in advance of the program. Special menu requests made the day of the seminar cannot be guaranteed and may require an additional charge.

Dates & Locations

Seminar participants may contact the hotels in the area to arrange lodging accommodations. A room block has not been reserved. Online reservations offer the lowest room rate.

Storm Lake - Tuesday, March 10

King's Pointe Resort
1520 E. Lakeshore Drive
Storm Lake, IA 50588

[☎](tel:712-213-4500) 712-213-4500

Johnston - Wednesday, March 11

Hilton Garden Inn Urbandale
8600 Northpark Drive
Johnston, IA 50131

[☎](tel:515-270-8890) (515) 270-8890

Cedar Rapids - Thursday, March 12

Hilton Garden Inn
1200 Collins Road, NE
Cedar Rapids, IA 52402

[☎](tel:319-393-6600) 319-393-6600

Questions

Contact Hannah Sloan at:

[✉](mailto:HSloan@iowabankers.com) HSloan@iowabankers.com

[☎](tel:515-286-2915) 515-286-2915