

Iowa IRA Seminar Schedule

Collin W. Fritz and Associates, Ltd. (CWF) is continuing to serve our Iowa Patrons in the same four, convenient locations. The same comprehensive, interactive, electronically enhanced, and easy to understand IRA, and HSA seminars will again be available throughout Iowa in 2010. *And this year, there will be two convenient sites for the popular 3-day IRA School.*

Complete details and topics for all the seminars will be available shortly, however, here is a short synopsis for these upcoming seminars.

Comprehensive IRA Update

Tues., April 20
Mason City

Wed., April 21
Iowa City/Coralville

Thurs., April 22
Des Moines

Fri., April 23
Storm Lake

- * All new and pending legislation will be discussed
- * 2010 RMDs will thoroughly be reviewed
- * All 2009 and 2010 Reporting changes are discussed
- * See how Social Security Number Truncation changes reporting
- * Rollovers and Direct Rollovers are reviewed
- * Learn the new rules affecting 2010 Roth IRA Conversions
- * Inherited IRAs will be thoroughly reviewed

3-Day IRA Schools

Storm Lake, IA
Tuesday – Thursday
May 11 – 13, 2010

Coralville, IA
Tuesday – Thursday
May 18 – 20, 2010

Brainerd, MN
Tuesday – Thursday
June 15 – 17, 2010

- * Complete establishment and administration procedures are thoroughly reviewed
- * Required and recommended documentation is compared
- * 2010 contribution and income limits will be covered
- * Required minimum distributions for IRA accountholders and beneficiaries will be thoroughly reviewed
- * Procedures for the complying administration of Inherited IRAs
- * All IRA reporting for the IRA Accountholder and Beneficiary is discussed
- * All **NEW** IRA laws, rules and procedures will be thoroughly explained
Both already enacted and still pending law changes will be on the agenda
- * See why excess contributions and recharacterizations continue to confuse everyone
- * Learn how HSAs affect IRAs, even if you do not administer HSAs
- * Be ready for the increase in Direct Rollovers with the new eligibility rules
- * Learn about designated Roth rollovers
- * Brief update on SEPs and SIMPLEs
- * All this and more

Sign up now. Set your calendars and budgets.



Phone 800-346-3961 • Fax 800-211-0760

www.pension-specialists.com e-mail info@pension-specialists.com

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Tues., April 20 Wed., April 21 Thurs., April 22 Fri., April 23
Mason City Iowa City/Coralville Des Moines Storm Lake

3-Day IRA Schools

Storm Lake, IA Coralville, IA Brainerd, MN
Tuesday – Thursday Tuesday – Thursday Tuesday – Thursday
May 11 – 13 May 18 – 20 June 15 – 17

Register Today! On-line, by Mail, or by Fax

2010 – Iowa Seminars

**If this registration is faxed or processed on-line—
please hold payment until you are invoiced.**

Please type or print:

SEMINAR CITY/STATE: _____ SEMINAR DATE: _____

INSTITUTION NAME: _____

ADDRESS: _____ CITY: STATE: ZIP: _____

PHONE: _____ FAX: _____

ATTENDEE—NAME _____ E-MAIL: _____

ATTENDEE—NAME _____ E-MAIL: _____

ATTENDEE—NAME _____ E-MAIL: _____

Indicate method of payment:

Check Enclosed (Make payable to Collin W. Fritz & Associates, Ltd.)

Bill Me – Contact Person _____

Office Use Only: Acct. No. _____ Date _____

For more seminar information, or additional sites, call 1-800-346-3961.

Special Needs: Please contact CWF well in advance of the seminar if any attendees have special needs, such as wheelchair accessibility, or dietary restrictions. We will gladly accommodate such needs, whenever possible.

Seminar Cancellation: Should CWF need to cancel a seminar for any reason, attendees will be notified as soon as possible.

Walk-In Registration
8:00 a.m. - 8:30 a.m.
Seminar Hours
8:30 a.m. – 3:30 p.m.

1-Day Seminar Fee:
1 attendee: \$185
2-5 attendees \$160 each*
6-10 attendees \$135 each*

3-Day School Fees:
1 attendee: \$575
2 attendees: \$450 each*
3 or More: \$375 each*

Please call for quote for more than ten attendees

*from the same financial institution

Additional Seminar Fees:
**Continuing Education Insurance Credits – \$10 Seminar \$25 School

***Electronic copy of seminar presentation – \$35 of school presentation – \$50

Cancellation Policy: If you give at least 2 weeks notice of your cancellation, then a refund will be made less a \$25 processing fee per attendee. Less than 2 weeks, no refund. Substitutions are welcome.

Notes: No audio/video recording, cellular phones, or smoking will be allowed in meeting rooms. We encourage you to dress casually as there may be temperature changes in the meeting room.



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