

3-Day IRA Schools



Storm Lake

Tuesday-Thursday
May 11-13, 2010
 Buena Vista
 University
 Siebens Forum
 610 W. Fourth St.
 800-383-2821



Coralville

Tuesday-Thursday
May 18-20, 2010
 Holiday Inn &
 Convention Center
 1220 1st Ave.,
 Coralville
 319-351-0819



Brainerd

Tuesday-Thursday
June 15-17, 2010
 CWF Corporate
 Offices
 17301 State
 Hwy. 371
 1-800-346-3961

- * Complete establishment and administration procedures are reviewed
- * Required and recommended documentation is compared
- * 2010 contribution and income limits will be covered
- * RMDs for IRA accountholders and beneficiaries will be reviewed
- * Procedures for the complying administration of Inherited IRAs
- * All IRA reporting for the Accountholder and Beneficiary is discussed
- * All **NEW** IRA laws, rules and procedures will be thoroughly explained
- * Why excess contributions and recharacterizations are confusing
- * Learn how HSAs affect IRAs, even if you do not administer HSAs
- * Be ready for the increase in Direct Rollovers with new eligibility rules
- * Learn about designated Roth rollovers
- * Brief update on SEPs and SIMPLEs
- * All this and more

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

3-Day IRA Schools

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:

I would like to receive future notifications via email at this address: _____

If you would like to be removed from CWF's fax/mailling list, please check the box, provide your fax number here: _____, and fax this sheet back to us at 1-800-211-0760. In case we have trouble locating your fax number in our database, please provide your phone number so we can contact you (_____) _____.

For more seminar information, 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.

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

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.

Indicate method of payment:

- Check Enclosed
(Make payable to Collin W. Fritz & Associates, Ltd.)
- Bill Me – Contact Person

Office Use Only:
 Acct. No. _____ Date _____



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