

# Telephone Seminars & Webinars

FOR RETIREMENT PLANS

***Convenient! Informative! Comprehensive! Interactive!  
Cost Effective! Current Topics!***

Coming soon to a PC near you telephone/internet seminars allowing interactive seminars without leaving your office. Another service CWF provides is webinars. This is an opportunity to help your staff gain strength in a problem area, or start training for new staff members. You can train a select few, or the entire staff, without traveling, and with a small amount of time away from the job. These programs will be presented by discussing one topic and allowing time for questions to be asked.

Most Webinars are approximately two hours in length for which the cost is \$185. Additional Branch Connections are \$75 each.

**These Webinars are available in the morning from 9:30 a.m. - 11:30 a.m. CST, and in the afternoon from 2 p.m. - 4 p.m. CST**

- Coverdell ESAs
- Excess Contributions & Recharacterizations
- Health Savings Accounts
- Inherited IRAs
- IRA Distributions & Roth Conversions
- IRA Reporting
- IRA Law Changes
- IRA RMDs
- SEPs & SIMPLEs\*\*\*
- Traditional & Roth Basics
- Transfers, Rollovers, & Direct Rollovers

\*\*\* The HSA and SEP/SIMPLE Webinars are approximately three hours in length for which the cost is \$275. Additional Branch Connections are \$125 each. **These webinars are available in the morning from 9a.m. - 12p.m. CST, and in the afternoon from 1:30p.m. - 4:30p.m. CST.** Call for special telephone seminar topics.

*Look on our website for updated seminar schedules at [www.pension-specialists.com](http://www.pension-specialists.com)*