



IRA Track of Continuous Learning

Get on Track and Stay on Track

2010-11 Fall, Winter, and Summer IRA Seminars and Webinars

Administering IRAs can be challenging. Getting on track and staying on track will be invaluable as millions of baby boomers prepare to retire and roll their retirement plan assets to IRAs. Continuous learning will keep you informed of new rules and compliance changes, and help you provide the information your account owners expect you to know.

Get on track and stay on track with our Fall, Winter, and Summer IRA Seminar Tours

Deepen your IRA knowledge where you need it most. Our experts will cover a wide range of categories, so you don't lag behind in any area.

Sign up online today at
www.WoltersKluwerFS.com/IRAseminars
or call 800.552.9410 to register for one of
the following seminars.

Beginner

- Establishment
- Regular Contribution Eligibility
- Distributions
- Rollovers, Transfers, and Direct Rollovers
- Required Minimum Distributions
- Beneficiary Options

Intermediate

- Regular Contributions
- Distributions
- Rollovers, Transfers, and Direct Rollovers
- Traditional-to-Roth IRA Conversions
- Required Minimum Distributions
- Beneficiary Options

Advanced

- Required Minimum Distributions
- Beneficiary IRA Administration
- Moving Assets Between IRAs
- Distributions
- Moving Assets Between Employer Plans and IRAs
- Recharacterization and Returned Contributions

Beginner

Alabama

Birmingham 12/1/10
Sheraton

Montgomery 5/17/11
Courtyard by Marriott

Arkansas

Jonesboro 3/17/11
Holiday Inn

Little Rock 3/16/11
Holiday Inn Airport Conference Center

Little Rock 5/10/11
Holiday Inn Airport Conference Center

California

Irvine 5/26/11
Hilton

Sacramento 5/25/11
Hilton Arden West

Colorado

Colorado Springs 3/23/11
Embassy Suites

Denver 3/24/11
Embassy Suites — Airport

Florida

Miami 5/5/11
Doubletree (was Sheraton)

Orlando 5/4/11
Holiday Inn

Tallahassee 6/8/11
Holiday Inn Conference Center

Tampa 5/3/11
Marriott — Westshore

Georgia

Atlanta (Georgia Park) 5/19/11
Holiday Inn Select

Macon 12/15/10
Anderson Conference Center

Macon 5/24/11
Anderson Conference Center

Statesboro 5/26/11
Statesboro Inn Bed & Breakfast

Idaho

Twin Falls 11/30/10
Best Western (Best America Suites)

Illinois

Champaign (Urbana) 5/10/11
Holiday Inn & Convention Center

Chicago (Arlington Heights) .. 10/19/10
Courtyard by Marriott

Chicago (Oak Lawn) 3/23/11
Hilton Oak Lawn

Chicago (Schaumburg) 5/12/11
Doubletree

Moline 10/21/10
Stoney Creek Inn & Conference

Mount Vernon 2/1/11
Holiday Inn

Mount Vernon 5/3/11
Holiday Inn

Naperville 11/3/10
Holiday Inn Select

Rockford 10/20/10
Holiday Inn

Rockford 6/14/11
Holiday Inn

Springfield 9/22/10
Hilton

Springfield 2/2/11
Crowne Plaza Hotel

Indiana

Fort Wayne 3/1/11
Hilton at Convention Center

Indianapolis 3/2/11
Radisson Indianapolis Airport

Iowa

Cedar Rapids 11/17/10
Crowne Plaza Hotel

Des Moines 3/15/11
Marriott

Des Moines 5/11/11
Embassy Suites Hotel

Kansas

Wichita 3/22/11
Best Western

Wichita 6/14/11
Best Western

Kentucky

Hebron (Cincinnati, OH) 3/3/11
Doubletree

Lexington 11/4/10
Embassy Suites

Louisiana

Baton Rouge 6/10/11
Hilton Garden Inn

Shreveport 2/1/11
Holiday Inn West

Maryland

Baltimore (Linthicum) 9/30/10
Holiday Inn

Massachusetts

Boston (Marlborough) 6/9/11
Embassy Suites

Michigan

Grand Rapids 9/29/10
Hilton

Lansing 5/18/11
Courtyard by Marriott

Minnesota

Duluth 3/8/11
Holiday Inn — Downtown

Minneapolis (Bloomington) 10/6/10
Crowne Plaza — Airport

Minneapolis (Bloomington) 3/16/11
Crowne Plaza — Airport

St. Cloud 9/29/10
Radisson Suites Hotel

St. Cloud 2/23/11
Radisson Suites Hotel

Mississippi

Jackson 6/9/11
Courtyard by Marriott

Tupelo 6/7/11
Hilton Garden Inn

Missouri

Columbia 1/19/11
Holiday Inn Select

Kansas City 10/27/10
Hilton — Airport

Kansas City 3/23/11
Hilton — Airport

Springfield 12/7/10
Doubletree

Springfield 2/15/11
Doubletree

St. Louis 1/20/11
Holiday Inn (St. Louis Airport)

Montana

Billings 10/13/10
Crowne Plaza

Missoula 3/9/11
Wingate by Wyndham

Nebraska

Grand Island 9/29/10
Quality Inn

Norfolk 3/15/11
Divots Conference Center

Omaha 10/27/10
Holiday Inn Central I-80

New Hampshire

(West) Lebanon 6/7/11
Fireside Inn & Suites

Manchester 10/14/10
Radisson — Center of NH

New Mexico

Albuquerque 1/12/11
Albuquerque Grand Hotel — Airport

North Carolina

Raleigh 2/24/11
Hilton — Airport

North Dakota

Bismarck 6/9/11
Best Western Doublewood Inn

Fargo 6/8/11
Holiday Inn

Ohio

Canton 2/1/11
McKinley Grand Hotel

Columbus (Worthington) 9/15/10
Holiday Inn

Columbus (Worthington) 2/2/11
Holiday Inn

Oklahoma

Oklahoma City 2/10/11
Embassy Suites Hotel — Airport

Tulsa 10/14/10
Embassy Suites Hotel

Pennsylvania

Harrisburg 6/15/11
Hilton Garden Inn East

Pittsburgh (Moon Township) 5/26/11
Holiday Inn Airport

Wilkes-Barre 9/28/10
The Woodlands Inn & Resort

South Carolina

Greenville 1/25/11
Embassy Suites Resort Hotel

South Dakota

Rapid City 2/24/11
Grand Gateway Hotel

Sioux Falls 10/21/10
Best Western — Ramkota Inn

Tennessee

Knoxville (Alcoa) 11/16/10
Hilton Inn — Airport

Memphis 6/8/11
Courtyard by Marriott

Nashville 6/15/11
Radisson Hotel

Texas

Abilene 5/17/11
Courtyard by Marriott

Amarillo 5/19/11
Ambassador Hotel

Austin 1/12/11
Holiday Inn NW Arboretum

Austin 5/4/11
Holiday Inn NW Arboretum

Dallas 10/28/10
Holiday Inn

Fort Worth 5/12/11
Holiday Inn

Houston 2/9/11
Holiday Inn Houston Airport

Houston 5/10/11
Holiday Inn Houston Airport

Lubbock 5/18/11
Holiday Inn — Hotel & Towers

San Antonio 2/8/11
Embassy Suites Hotel — Int'l Airport

Texarkana 3/15/11
Courtyard by Marriott

Tyler 2/2/11
Holiday Inn

Virginia

Richmond 2/23/11
Wyndham — Airport

Washington

Seattle 10/20/10
Holiday Inn — Airport

West Virginia

Charleston 5/25/11
Marriott — Town Center

Wisconsin—Hosted by WBA

Eau Claire 9/16/10
Holiday Inn Campus Area

Madison 9/21/10
Holiday Inn at the American Center

Neenah 9/14/10
Bridgewood Resort Hotel & Conf Center

Wyoming

Cheyenne 3/22/11
Little America Hotel

Intermediate

Alabama

Dothan..... 3/3/11
 Courtyard by Marriott
 Huntsville..... 11/30/10
 Holiday Inn Select
 Mobile..... 11/19/10
 Marriott

Arizona

Phoenix..... 1/13/11
 Holiday Inn Airport

Arkansas

Springdale (Fayetteville)..... 2/8/11
 Holiday Inn

California

San Diego..... 12/3/10
 Holiday Inn on the Bay
 San Francisco (Walnut Creek) 11/30/10
 Holiday Inn Express
 San Jose..... 1/27/11
 Radisson Plaza Hotel — Airport
 San Luis Obispo..... 1/25/11
 Holiday Inn Express
 Santa Monica..... 1/26/11
 Le Merigo (Marriott)

Florida

Jacksonville..... 10/14/10
 Hilton Garden Inn
 Pensacola..... 6/7/11
 Homewood Inn (Hilton)

Georgia

Albany..... 12/14/10
 Hilton Garden Inn
 Valdosta..... 3/2/11
 Holiday Inn & Conf Center

Illinois

Moline..... 6/16/11
 Stoney Creek Inn & Conference Center

Peoria..... 9/21/10
 Holiday Inn — City Center
 Utica..... 3/2/11
 Starved Rock Lodge Conference Center
 Springfield..... 5/5/11
 Crowne Plaza Hotel

Indiana

Evansville..... 11/2/10
 Marriott — Airport
 South Bend..... 3/22/11
 Marriott

Iowa

Burlington..... 11/16/10
 The Pzazz (Best Western Fun City)
 Storm Lake..... 10/26/10
 Buena Vista University

Kansas

Chanute..... 10/13/10
 Tioga Suites Hotel
 Salina..... 9/15/10
 Courtyard by Marriott
 Topeka..... 9/16/10
 Holiday Inn — West

Kentucky

Louisville..... 11/3/10
 Holiday Inn

Louisiana

Alexandria..... 11/16/10
 Best Western Inn & Suites & Conf Ctr
 Lafayette..... 11/17/10
 Holiday Inn — North
 New Orleans (Metairie)..... 11/18/10
 Holiday Inn New Orleans Airport

Maine

Portland..... 10/5/10
 Embassy Suites

Michigan

Marquette..... 9/28/10
 Holiday Inn

Minnesota

Minneapolis (Bloomington)..... 5/19/11
 Crowne Plaza — Airport
 St. Cloud..... 5/12/11
 Radisson Suites Hotel

Missouri

Cape Girardeau..... 10/5/10
 Drury Lodge
 Kansas City..... 6/16/11
 Hilton — Airport

Nebraska

Lincoln..... 9/30/10
 The Cornhusker Marriott

New York

Long Island (Uniondale)..... 10/7/10
 Marriott Hotel & Conf Center

North Carolina

Charlotte..... 2/24/11
 Sheraton

Oregon

Portland..... 10/19/10
 Hilton Garden Inn

South Carolina

Columbia..... 2/23/11
 Sheraton

Tennessee

Chattanooga..... 11/17/10
 Holiday Inn
 Jackson..... 11/3/10
 Doubletree Hotel
 Johnson City..... 3/8/11
 Holiday Inn
 Knoxville (Alcoa)..... 6/14/11
 Hilton Inn — Airport

Texas

Corpus Christi..... 11/30/10
 Radisson Hotel
 El Paso..... 1/11/11
 Marriott
 Midland (Odessa)..... 12/7/10
 MCM Grande Hotel
 San Angelo..... 5/3/11
 Fairfield Inn
 Waco..... 1/11/11
 Courtyard by Marriott
 Wichita Falls..... 11/17/10
 Holiday Inn

Utah

Salt Lake City..... 12/1/10
 Holiday Inn Airport

Virginia

Roanoke..... 10/5/10
 Holiday Inn — Tanglewood

Washington

Spokane..... 1/26/11
 Holiday Inn Airport

West Virginia

Morgantown..... 9/22/10
 Lakeview Resort & Conf Center

Advanced

Alabama

Birmingham 2/10/11
Sheraton

Birmingham 5/18/11
Sheraton

Montgomery 12/2/10
Courtyard by Marriott

Arkansas

Jonesboro 12/16/10
Holiday Inn

Little Rock 12/15/10
Holiday Inn Airport Conf Center

Little Rock 5/11/11
Holiday Inn Airport Conference Center

California

Irvine 12/2/10
Marriott Hotel

Sacramento 12/1/10
Hilton Arden West

Colorado

Colorado Springs 9/22/10
Embassy Suites

Denver 9/23/10
Holiday Inn Stapleton

Florida

Ft. Lauderdale (Dania Beach) ... 11/4/10
Hilton

Orlando 11/3/10
Holiday Inn

Tallahassee 10/13/10
Holiday Inn Conference Center

Tampa 11/2/10
Marriott – Westshore

Georgia

Atlanta (Georgia Park) 12/16/10
Holiday Inn Select

Macon 3/1/11
Anderson Conference Center

Macon 5/25/11
Anderson Conference Center

Statesboro 1/27/11
Statesboro In Bed & Breakfast

Idaho

Pocatello 3/8/11
Holiday Inn

Illinois

Champaign (Urbana) 11/2/10
Holiday Inn & Convention Center

Chicago (Arlington Heights) 3/24/11
Courtyard by Marriott

Chicago (Naperville) 5/11/11
Holiday Inn Select

Chicago (Oak Lawn) 9/28/10
Hilton Oak Lawn

Chicago (Schaumburg) 11/4/10
Doubletree

Moline 3/3/11
Stoney Creek Inn & Conference

Mount Vernon 10/6/10
Holiday Inn

Mount Vernon 5/4/11
Holiday Inn

Rockford 3/1/11
Holiday Inn

Rockford 6/15/11
Holiday Inn

Springfield 9/23/10
Hilton

Springfield 2/3/11
Crowne Plaza Hotel

Indiana

Fort Wayne 10/19/10
Hilton at Convention Center

Indianapolis 10/20/10
Courtyard by Marriott

Iowa

Cedar Rapids 5/10/11
Crowne Plaza Hotel

Des Moines 10/28/10
Marriott

Des Moines 5/12/11
Embassy Suites Hotel

Kansas

Wichita 9/14/10
Best Western

Wichita 6/15/11
Best Western

Kentucky

Hebron (Cincinnati, OH) 10/21/10
Doubletree

Lexington 5/24/11
Embassy Suites

Louisiana

Shreveport 10/26/10
Holiday Inn West

Baton Rouge 1/20/11
Hilton Garden Inn

Maryland

Baltimore (Linthicum) 6/14/11
Holiday Inn

Massachusetts

Boston (Marlborough) 10/6/10
Embassy Suites

Michigan

Lansing 9/30/10
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Hilton

Minnesota

Duluth 10/28/10
Holiday Inn – Downtown

Minneapolis (Bloomington) 10/7/10
Crowne Plaza – Airport

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St. Cloud 9/30/10
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St. Cloud 2/24/11
Radisson Suites Hotel

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Doubletree

Springfield 2/16/11
Doubletree

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Fargo 10/20/10
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Holiday Inn

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Tulsa 2/9/11
Embassy Suites Hotel

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Harrisburg 9/29/10
Hilton Garden Inn East

Pittsburgh (Moon Township) 9/23/10
Holiday Inn Airport

Wilkes-Barre 6/16/11
The Woodlands Inn & Resort

South Carolina

Sumter 1/26/11
Hampton Inn

South Dakota

Rapid City 10/14/10
Grand Gateway Hotel

Sioux Falls 6/7/11
Best Western – Ramkota Inn

Tennessee

Knoxville (Alcoa) 3/9/11
Hilton Inn – Airport

Memphis 11/4/10
Courtyard by Marriott

Nashville 11/18/10
Radisson Hotel

Texas

Abilene 11/16/10
Courtyard by Marriott

Amarillo 12/9/10
Ambassador Hotel

Austin 1/13/11
Holiday Inn NW Arboretum

Austin 5/5/11
Holiday Inn NW Arboretum

Dallas 2/3/11
Holiday Inn

Fort Worth 11/18/10
Holiday Inn

Houston 12/2/10
Holiday Inn Houston Airport

Houston 5/11/11
Holiday Inn Houston Airport

Lubbock 12/8/10
Holiday Inn – Hotel & Towers

San Antonio 12/1/10
Embassy Suites Hotel – Int'l Airport

Texarkana 12/14/10
Courtyard by Marriott

Tyler 10/27/10
Courtyard by Marriott

Virginia

Richmond 10/6/10
Wyndham – Airport

Washington

Seattle 1/25/11
Holiday Inn – Airport

Wisconsin – Hosted by WBA

Eau Claire 9/17/10
Holiday Inn Campus Area

Madison 9/22/10
Holiday Inn at the American Center

Neenah 9/15/10
Bridgewood Resort Hotel & Conf Center

West Virginia

Charleston 9/21/10
Marriott – Town Center

Wyoming

Cheyenne 9/21/10
Little America Hotel

Webinars Only

Webinars Recommended without Live Seminar

- Overview/Establishment/Eligibility: An IRA Foundation
- Distributions: It's an IRA Owner's Money, but...
- Rollovers/Transfers/Direct Rollovers: IRA and Employer Plan Portability
- IRA Conversions: What and Why
- Excess Contributions / Recharacterizations: Understanding the Difference
- Required Minimum Distributions: At What Age and How Much!
- Beneficiary IRA Administration: Forms, Options, and Reporting
- IRA Reporting: Proper and Timely Completion Avoids Penalties
- Rollovers/Transfers: What is the Difference
- IRA Policies and Procedures: What Every Custodian and Trustee Should Know
- IRA Self-Audit: What to Look For
- HSAs (Beginner)
- HSAs (Advanced)
- SEPs and SIMPLE: In Simple Terms

Beginner

Webinars Recommended with Live Seminar

- Overview/Establishment/Eligibility: An IRA Foundation (Pre-seminar)
- Rollovers/Transfers/Direct Rollovers: IRA and Employer Plan Portability (Post seminar)

Intermediate

Webinars Recommended with Live Seminar

- Overview/Establishment/Eligibility: An IRA Foundation (Pre-seminar)
- Rollovers/Transfers/Direct Rollovers: IRA and Employer Plan Portability (Pre-seminar)
- Distributions: It's an IRA Owner's Money, but ... (Post seminar)
- Required Minimum Distributions: At What Age and How Much! (Post seminar)
- Beneficiary IRA Administration: Forms, Options, and Reporting (Post seminar)

Advanced

Webinars Recommended with Live Seminar

- Rollovers/Transfers/Direct Rollovers: IRA and Employer Plan Portability (Pre-seminar)
- Required Minimum Distributions: At What Age and How Much! (Pre-seminar)
- Beneficiary IRA Administration: Forms, Options, and Reporting (Pre-seminar)
- IRA Conversions: What and Why (Post seminar)
- Excess Contributions /Recharacterizations: Understanding the Difference (Post seminar)