

2017 CPA Educational Offerings

*Ascend
IRA Institute*



ascensus®
Always have a plan

retirement services | college savings | consulting | compliance | academy | trust



Ascend

As a respected industry leader, Ascensus has been providing financial organizations with retirement savings education and training for more than 35 years. Its unique *Ascend* conference specifically addresses the needs of financial organizations in the ever-changing retirement savings plan industry.

Ascend's flexible format allows you to create your own curriculum to enhance your industry knowledge. Through interactive presentations, you'll gain insight on compliance and operations and learn how to increase sales and marketing opportunities

Why Attend *Ascend* in 2017?

The *Ascend* education conference offers the following advantages.

- The latest industry developments in the ever-changing retirement industry
- Practical industry-leading ideas to take back to your office
- Networking and discussion opportunities with your industry peers
- Continuing education credits available for most industry designations
- Courses are taught through engaging activities and real-world exercises
- Flexibility to choose your classes based on your skill level and interests

Who Should Attend *Ascend*?

Retirement, health, and education savings plan professionals at all levels attend *Ascend*. And for those who want to network with others in the industry, *Ascend* brings together all types of financial professionals.

- Retirement Plan Product Managers
- Relationship Managers
- Operations and Compliance Managers and Staff
- Personal Bankers
- IRA Administrators
- Trust Officers
- Investment Advisors
- Retirement Plan Client Services Managers and Staff Members
- Call Center Managers and Support Staff
- Individuals with retirement industry designations





Ascend Course Topics

Whether you're interested in learning the fundamentals or want to explore more advanced topics, *Ascend* courses cover all aspects of retirement, health, and education savings plans.

Below is a sample listing of course topics to be offered at Ascend in 2017.

New Course Topics for 2017

- CIS II Exam Prep Workshop
- Bankruptcy: What's Next
- Fiduciary Best Practices
- IRAdirect® RMD Processes
- IRA Fundamentals Parts 1 and 2
- Everything Roth
- QRP Distributable Events
- QRP Legal Issues
- QRP Mergers and Acquisitions
- Retirement Saving Strategies
- Social Security and Retirement
- Top 10 HSA issues
- HSAs and Medicare: What Happens at Retirement?



Dates and Locations

Jersey City, NJ – June 19–21, 2017

Hyatt Regency Jersey City
Two Exchange Place
Jersey City, NJ 07302
201-469-1234
Room Rate: **\$289**



New Orleans, LA – September 18–20, 2017

Intercontinental New Orleans
444 St. Charles Avenue
New Orleans, LA 70130
504-525-5566
Room Rate: **\$169**



San Diego, CA – November 13–15, 2017

Westin San Diego Gaslamp Quarter
910 Broadway Circle
San Diego, CA 92101
619-239-2200
Room Rate: **\$245**



Conference Fees

First Attendee **\$1,399**

Each Additional Attendee **\$1,299**

Optional CIS Certification Exam **\$275**

Conference Fee Includes

- Three days of premier retirement and savings plan education
- Full breakfast daily and lunch each day
- Welcome reception on Monday evening

Additional Attendee Information

Prerequisites: No prerequisites required for basic courses; basic IRA knowledge required for advanced courses.

Advanced Preparation: No advanced preparation required

Program Level: Both basic and advanced courses available

Delivery Method: Group – Live

To register, visit www.ascensus.com/Ascend2017 or call 800-346-3860.

Contact Information: For information regarding refunds, questions, or program cancellation policies, please contact the Education Department at 800-346-3860.

Cancellation policy: You may cancel your registration, 30 days prior to the program date for a full refund. After that time, cancellations are subject to a 25 percent service charge of registration fees paid. No refund will be granted if you cancel 7 days or less before the program begins, unless your reservation can be filled from a waiting list; then, only the 25 percent fee would apply. CIS exam is non-refundable after November 15, 2017. Substitutions are accepted at any time. *Ascend* is not intended as tax or legal advice.

2017 IRA Institute

The *IRA Institute*, an intensive five-day program, teaches experienced IRA professionals detailed, essential IRA information. The *IRA Institute* is an excellent program for individuals preparing to take the Certified IRA Services Professional (CISP) or Certified IRA Professional (CIP) exam. Extensive IRA reference materials, objective-based training methods, and practical applications of IRA rules create an effective learning environment.

Attaining the prestigious CISP or CIP designation earns an individual national recognition as an experienced, dedicated IRA professional.

Instructors

All *IRA Institute* instructors are retirement services industry professionals with extensive IRA backgrounds. Ascensus' instructors research challenging retirement plan issues and rules in an ongoing effort to develop comprehensive and practical training solutions.

Learning Objectives

The *IRA Institute* focuses on the operational aspects of

- IRAs (Traditional and Roth),
- SEP plans, and
- SIMPLE IRA plans.

After successfully completing this program, you will be able to

- establish and administer Traditional and Roth IRAs,
- understand the rules for SEP and SIMPLE IRA plans,
- identify contribution eligibility requirements,
- process distributions,
- conduct rollovers and transfers,
- describe beneficiary options and facilitate beneficiary transactions, and
- manage error resolution, penalties, and reporting.

Benefits

- Obtain the newest information and industry developments affecting IRAs
- Learn IRA rules through focused, interactive learning sessions
- Network with peers and professional colleagues from across the nation
- Prepare for the CISP or CIP examination

Registration

To register for the *IRA Institute*, visit our website at www.ascensus.com. To request additional information, contact an Ascensus Sales Representative at 800-346-3860.

Examinations

Successfully completing the *IRA Institute*, as well as meeting the eligibility requirements,* will help you prepare for the CIP or CISP exam and potentially obtain a professional designation.

*Please contact an Ascensus Sales Representative for additional information on eligibility requirements.

Continuing Professional Education (CPE) Credits

The *IRA Institute* is eligible for 30 CPE credits for Certified Public Accountants (CPA). Contact an Ascensus Customer Service Representative at 800-346-3860 for more information regarding CPE credits.

Additional Attendee Information

Prerequisites: Recommended two years for IRA operational or compliance experience

Advanced Preparation: No advanced preparation required

Program Level: Intermediate – Advanced

Delivery Method: Group – Live

Dates and Locations

Clearwater Beach, FL

June 12-16, 2017

(Optional CIP/CISP exam - Saturday, June 27, 2017)

Wyndham Grand Resort
100 Coronado Drive
Clearwater Beach, FL 33767
727-281-9500

Denver, CO

September 25-29, 2017

(Optional CIP/CISP exam - Saturday, September 30, 2017)

Denver Marriott City Center
1701 California Street
Denver, CO 80202
(303) 297-1300

Conference Fee

\$1,799 per person



IRA Institute
for the IRA professional

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