



Tri-State CFT partners with ASCENSUS to bring you IRA Seminars in Columbus and Cleveland, OH

IRA Essentials: Everything from A to Z

8:30 AM-4:00 PM (Registration begins at 8:00 AM)
\$199 for first person/\$180 for each additional person from the same bank

In Columbus

Wednesday March 10, 2010 at Courtyard Columbus Airport, 2901 Airport Drive, Columbus, OH 43219

In Cleveland

Thursday, March 18, 2010 at Courtyard Cleveland Marriot, 24901 Country Club Blvd. N., Olmsted OH 44070

This seminar is designed to teach IRA fundamentals to individuals who are new to the retirement industry or who need a general IRA refresher. Although the IRA Essentials seminar is an introductory course, our presenter will assist attendees with more advanced questions.

Course topics include: Roth and Traditional IRA Plan Establishment, Contributions, Moving IRA Assets, Roth and Traditional IRA Distributions and Required Reporting.

This seminar has been approved for 7.25 CIP, NCCO, CISP, CRSP, CTFA and CFP continuing education hours.

Advanced IRAs

8:30 AM-4:00 PM (Registration begins at 8:00 AM)
\$199 for first person/\$180 for each additional person from the same bank

In Columbus

Thursday, March 11, 2010 at Courtyard Columbus Airport, 2901 Airport Drive, Columbus, OH 43219

In Cleveland

Friday, March 19, 2010 at Courtyard Cleveland Marriot, 24901 Country Club Blvd. N., Olmsted, OH 44070

This seminar will cover recent trends and market strategies to help you answer clients' questions regarding new rollover opportunities and to help you acquire new IRA assets for your organization, as well as complex IRA distribution topics related to these types of transaction.

Course topics include: Service Enhancement Opportunities, Required Minimum Distributions, Beneficiary Issues and Reporting Requirements.

This seminar has been approved for 7.25 CIP, NCCO, CISP, CRSP, CTFA and CFP continuing education hours.

REGISTRATION FORM

Send completed registration form to Tri-State CFT, 635 W. Seventh St., Ste. 306, Cincinnati, OH 45203 **OR** fax to 513-621-5448.

Register for the seminar of your choice at least 10 days in advance. Call 513-621-8408 with questions.

Name: _____ Last 4 of SSN: _____

Name of your financial institution: _____

Address of your financial institution, including mail location: _____

City: _____ State: _____ Zip: _____

Work Phone: _____ Cost Center _____

Seminar Title(s): _____

Email address*: _____

***An email address is required, as your confirmation will be emailed to you.**

STUDENT AUTHORIZATION

I understand this registration cannot be processed unless all information is correctly completed. **There are no cancellations permitted for these seminars, although a substitute may be sent in your place.**

Signature _____ Date _____

Supervisor's Signature _____ Date _____

Payment Options: Credit Card Bill my financial institution Check enclosed

Type of Credit Card: _____ Credit Card Number: _____

Expiration Date: _____ Name on Credit Card: _____