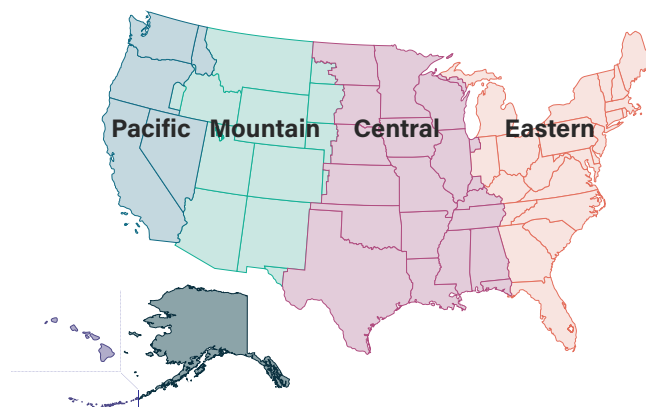


2024 Live Webinar Schedule



Webinar Name	Date	Pacific Time Zone	Mountain Time Zone	Central Time Zone	Eastern Time Zone
FEBRUARY					
IRAs: Establishing and Amending	2/6/2024	1:00 p.m.	2:00 p.m.	3:00 p.m.	4:00 p.m.
2024 Legislative Update	2/7/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
HSA Fundamentals	2/8/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
Roth IRAs: What You Need to Know	2/15/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Fundamentals	2/22/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
MARCH					
IRA Contributions and Tax Time	3/5/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Required Minimum Distributions	3/7/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
HSAs – Advanced	3/14/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Transfers and Rollovers	3/21/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Reporting Requirements	3/26/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
MAY					
IRA Beneficiary Distributions – Part 1	5/2/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Issues: Top 10 Wrap-up (2024 Edition)	5/7/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Beneficiary Distributions – Part 2	5/9/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRAs: Is Your Program in Compliance	5/16/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
403(b)/457(b) Fundamentals	5/23/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
JULY					
IRAs: Handling Complex Death Claims	7/9/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Legal Issues	7/11/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
Fraud – What You Need to Know	7/18/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
AUGUST					
2024 Legislative Update	8/1/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Beneficiary Distributions – Part 1	8/6/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Trust Beneficiary Issues and How to Handle Them	8/8/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Beneficiary Distributions – Part 2	8/15/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
HSA Fundamentals	8/20/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.

Webinar Name	Date	Pacific Time Zone	Mountain Time Zone	Central Time Zone	Eastern Time Zone
SEPTEMBER					
HSAs – Advanced	9/10/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRAs: Establishing and Amending	9/12/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRAs and Employer Plans: Recognizing Prohibited Transactions	9/17/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Fundamentals	9/24/2024	1:00 p.m.	2:00 p.m.	3:00 p.m.	4:00 p.m.
IRA Excess Contributions and Recharacterizations	9/26/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
OCTOBER					
IRA Distributions	10/15/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Withholding Rules – And Getting Them Right	10/24/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
HSAs: Top 10 Wrap-Up (2024 Edition)	10/31/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
NOVEMBER					
IRA Reporting Requirements	11/5/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Required Minimum Distributions	11/7/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
HSAs and Medicare	11/12/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Transfers and Rollovers	11/14/2024	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
DECEMBER					
IRAs: Handling Complex Death Claims	12/5/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
Education: Comparing Coverdell ESAs, 529 Plans, UTMA's and UGMA's	12/10/2024	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.



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