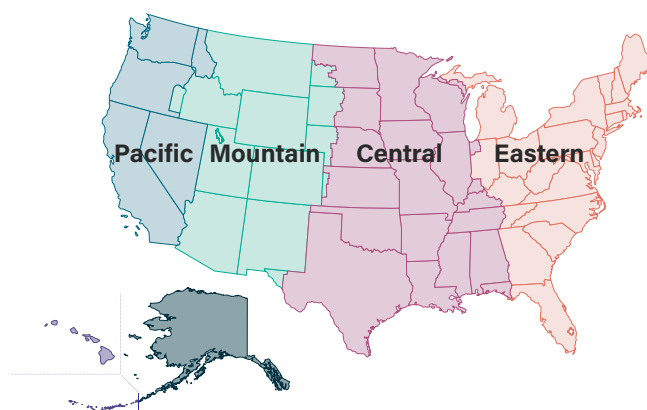


2025 Live Webinar Schedule



Webinar Name	Date	Pacific Time Zone	Mountain Time Zone	Central Time Zone	Eastern Time Zone
FEBRUARY					
IRAs: Establishing and Amending	2/4/2025	1:00 p.m.	2:00 p.m.	3:00 p.m.	4:00 p.m.
2025 Legislative Update	2/5/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
HSA Fundamentals	2/6/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
Roth IRAs: What You Need to Know	2/13/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Fundamentals	2/20/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
MARCH					
IRA Contributions and Tax Time	3/4/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Required Minimum Distributions	3/6/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
HSAs – Advanced	3/13/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Transfers and Rollovers	3/20/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Reporting Requirements	3/25/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
MAY					
IRA Beneficiary Distributions – Part 1	5/1/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Beneficiary Distributions – Part 2	5/6/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Issues: Top 10 Wrap-up (2025 Edition)	5/8/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRAs: Is Your Program in Compliance	5/15/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
JULY					
IRAs: Handling Complex Death Claims	7/8/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Legal Issues	7/10/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
2025 Legislative Update	7/31/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
AUGUST					
IRA Beneficiary Distributions – Part 1	8/5/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Beneficiary Distributions – Part 2	8/14/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
HSA Fundamentals	8/19/2025	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	9/9/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRAs: Establishing and Amending	9/11/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRAs and Employer Plans: Recognizing Prohibited Transactions	9/16/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Fundamentals	9/23/2025	1:00 p.m.	2:00 p.m.	3:00 p.m.	4:00 p.m.
IRA Excess Contributions and Recharacterizations	9/25/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
OCTOBER					
IRA Distributions	10/14/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Withholding Rules – And Getting Them Right	10/23/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
HSAs: Top 10 Wrap-Up (2025 Edition)	10/30/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
NOVEMBER					
IRA Reporting Requirements	11/4/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Required Minimum Distributions	11/6/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
HSAs and Medicare	11/11/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Transfers and Rollovers	11/13/2025	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
DECEMBER					
IRAs: Handling Complex Death Claims	12/4/2025	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	12/9/2025	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.



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