

Ascensus Training

Looking for options for training your staff?
Turn to Ascensus' Video Training Series
and Training Organizers.

Video Training Series

Consistent compliance training is essential to running a successful IRA program. To help you manage your resources and conduct training when you need it, the industry experts at Ascensus have developed a video series that not only provides ongoing education, but includes the information necessary to answer many of the questions your customers have today.

Ascensus' *Video Training Series* is designed to bring classroom style training into your organization with courses that may be viewed at any time by any member of your organization. Videos are 45-60 minutes in length and include a workbook with case studies, exercises, and an assessment to gauge understanding.

Whether your training needs are basic or advanced, this video training offers courses that meet your organization's objectives. Available courses include the following.

- IRA Basics
- IRA Establishment
- IRA Contributions
- Understanding Transfers and Rollovers
- Traditional IRA Distributions
- IRA Reporting
- Advanced HSAs
- HSA Basics
- Roth IRA Distributions
- IRA Beneficiary Distributions
- Conversions and Recharacterizations
- IRA Required Minimum Distributions
- 72(t) Payments
- SEP Plans
- SIMPLE IRA Plans
- IRA Excess Contributions



Training Organizers

Maintaining a well-trained staff can be challenging and time-consuming, especially when conducting your own training. This is where Ascensus *Training Organizers* come to your aid—we provide everything you need to create your own training course on IRAs and HSAs.

The *IRA* and *HSA Training Organizers* are designed to help you efficiently train your staff on IRA and HSA fundamentals. Designed to accommodate all learning styles, these comprehensive toolkits allow you to effectively customize your internal training program to meet the needs of your team.

Training Organizer Components

- Trainer Guide—general instruction, helpful training tips, references to specific PowerPoints®, and optional handouts, activities and exam with all the answers
- Trainer CD—PowerPoint presentation, training agenda, IRS documents, helpful forms, optional handouts, student exercises, and exam
- Presentation Notes—built-in easel and talking points for specific PowerPoint topics
- Student Guide—general instruction and plenty of room for notes

For more information regarding the *Video Training Series* or the *Training Organizers*, please contact Lisa Phillips at Southeast Regional CFT by calling 904-354-4830 or emailing lisaphillips@cft@bellsouth.net or call an Ascensus Customer Service Representative at 800-346-3860.