

2020 Live Webinar Schedule



Webinar Name	Date	Pacific Time Zone	Mountain Time Zone	Central Time Zone	Eastern Time Zone
JANUARY					
B HSA Fundamentals	1/14/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
B IRA Fundamentals	1/16/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
A HSAs - Beyond the Fundamentals	1/23/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
FEBRUARY					
B 2020 Legislative Update	2/4/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
A Everything Roth	2/6/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
A 2020 Top 10 HSA Issues	2/11/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
B Opening and Maintaining IRAs	2/13/2020	1:00 p.m.	2:00 p.m.	3:00 p.m.	4:00 p.m.
MARCH					
A IRA Excess Contributions and Recharacterizations	3/3/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
B IRA Contributions	3/10/2020	1:00 p.m.	2:00 p.m.	3:00 p.m.	4:00 p.m.
B IRA Required Minimum Distributions	3/12/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
B IRA Distributions	3/24/2020	1:00 p.m.	2:00 p.m.	3:00 p.m.	4:00 p.m.
B IRA Transfers and Rollovers	3/26/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
APRIL					
B IRA Reporting	4/7/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
MAY					
B Rollovers Between Retirement Plans and IRAs	5/5/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
B 2020 Top 10 IRA Issues	5/7/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
B IRA Fundamentals	5/12/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
B IRA Beneficiary Distributions - Part 1	5/14/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
A IRA Beneficiary Distributions - Part 2	5/19/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
B IRA Withholding and Getting it Right	5/20/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
A Building and Maintaining a Compliant IRA Program	5/21/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
JULY					
A Complex Death Claims and How to Handle Them	7/14/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
A IRA Legal Issues and How To Avoid Them	7/16/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
AUGUST					
B IRA Beneficiary Distributions - Part 1	8/11/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
A IRA Trust Issues and How To Handle Them	8/13/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
B HSA Fundamentals	8/20/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
A IRA Beneficiary Distributions - Part 2	8/20/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
A HSAs - Beyond the Fundamentals	8/25/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.

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Webinar Name	Date	Pacific Time Zone	Mountain Time Zone	Central Time Zone	Eastern Time Zone
SEPTEMBER					
A IRA Excess Contributions and Recharacterizations	9/15/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
A Everything Roth	9/17/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
A Recognizing Prohibited Transactions	9/22/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
E SIMPLE Plans	9/24/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
OCTOBER					
B IRA Required Minimum Distributions	10/6/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
B IRA Fundamentals	10/8/2020	1:00 p.m.	2:00 p.m.	3:00 p.m.	4:00 p.m.
B IRA Withholding and Getting it Right	10/27/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
NOVEMBER					
B Opening and Maintaining IRAs	11/3/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
A 2020 Top 10 HSA Issues	11/5/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
B IRA Contributions	11/10/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
B IRA Reporting	11/10/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
B HSAs and Medicare	11/12/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
B IRA Transfers and Rollovers	11/19/2020	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
B IRA Distributions	11/24/2020	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.

- B** = Basic IRA, HSA, and ESA Webinars
- A** = Advanced IRA and HSA Webinars
- E** = Employer-Sponsored Retirement Plan Webinars

