2023 Live Webinar Schedule



| RAS: Establishing and Amending 2/7/23 1:00 p.m. 2:00 p.m. 3:00 p.m. 4:00 p.m. Roth IRAs: What You Need to Know 2/16/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 2:00 p.m. Roth IRAs: What You Need to Know 2/16/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 1:00 p.m. 2:00 p.m. Roth IRAS: What You Need to Know 2/16/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 1:00 p.m. 1 | Webinar Name | Date | Pacific Time Zone | Mountain Time Zone | Central Time Zone | Eastern Time Zone | |
|--|--|---------------------------------|----------------------|-----------------------|----------------------|----------------------|-----------|
| FEBRUARY 2023 Legislative Update 2/2/23 11:00 a.m. 12:00 p.m. 10:00 a.m. 11:00 a.m. RAS: Establishing and Amending 2/7/23 11:00 a.m. 12:00 p.m. 10:00 p.m. 2:00 p.m. Roth IRAs: What You Need to Know 2/16/23 11:00 a.m. 12:00 p.m. 10:00 p.m. 2:00 p.m. IRA Fundamentals 2/23/23 11:00 a.m. 12:00 p.m. 10:00 p.m. 2:00 p.m. MARCH 3/7/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Contributions and Tax Time 3/7/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Required Minimum Distributions 3/9/23 11:00 a.m. 12:00 p.m. 10:00 a.m. 11:00 a.m. IRA Reporting Requirements 3/23/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Suses: Top 10 Wrap-up (2023 Edition) 5/4/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 1 5/11/23 11:00 a.m. 12:00 p.m. 10:00 p.m. 2:00 p.m. I | JANUARY | | | | | | |
| FEBRUARY 1/18/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. 12:00 p.m. 10:00 p.m. 2:00 p.m. 10:00 p.m. 2:00 p.m. 10:00 p.m. 2:00 p.m. 10:00 p.m. | HSA Fundamentals | 1/12/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| 2023 Legislative Update 2/2/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 1:00 p.m. 1:0 | SECURE 2.0 Act | | 8:00 a.m. | | • | | |
| RAS: Establishing and Amending 2/7/23 1:00 p.m. 2:00 p.m. 3:00 p.m. 4:00 p.m. Roth IRAs: What You Need to Know 2/16/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 2:00 p.m. Roth IRAs: What You Need to Know 2/16/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 1:00 p.m. 2:00 p.m. Roth IRAS: What You Need to Know 2/16/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 1:00 p.m. 1 | FEBRUARY | | | | | | |
| Roth IRAs: What You Need to Know 2/16/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 1:00 p.m. 1:00 p.m. 2:00 p.m. 1:00 p.m. 1:00 p.m. 2:00 p.m. 1:00 | 2023 Legislative Update | 2/2/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| IRA Fundamentals 2/23/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. MARCH IRA Contributions and Tax Time 3/7/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Required Minimum Distributions 3/9/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. HSAs - Advanced 3/14/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Transfers and Rollovers 3/23/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Reporting Requirements 3/28/23 11:00 a.m. 12:00 p.m. 10:00 a.m. 11:00 a.m. IRA Issues: Top 10 Wrap-up (2023 Edition) 5/4/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 1 5/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRAs: Is Your Program in Compliance 5/18/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. JULY IRAs: Handling Complex Death Claims 7/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. <td cols<="" td=""><td>IRAs: Establishing and Amending</td><td>2/7/23</td><td>1:00 p.m.</td><td>2:00 p.m.</td><td>3:00 p.m.</td><td>4:00 p.m.</td></td> | <td>IRAs: Establishing and Amending</td> <td>2/7/23</td> <td>1:00 p.m.</td> <td>2:00 p.m.</td> <td>3:00 p.m.</td> <td>4:00 p.m.</td> | IRAs: Establishing and Amending | 2/7/23 | 1:00 p.m. | 2:00 p.m. | 3:00 p.m. | 4:00 p.m. |
| MARCH IRA Contributions and Tax Time 3/7/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Required Minimum Distributions 3/9/23 11:00 a.m. 12:00 p.m. 1:00 a.m. 10:00 a.m. 11:00 a.m. HSAs - Advanced 3/14/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Transfers and Rollovers 3/23/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Reporting Requirements 3/28/23 11:00 a.m. 12:00 p.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 1 5/4/23 8:00 a.m. 9:00 a.m. 10:00 p.m. 2:00 p.m. IRAs: Is Your Program in Compliance 5/16/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. JULY IRAs: Handling Complex Death Claims 7/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. AUGUST AUGUST 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 18 A B B B B B B B B B B B B B B B B B B | Roth IRAs: What You Need to Know | 2/16/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| IRA Contributions and Tax Time 3/7/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Required Minimum Distributions 3/9/23 11:00 a.m. 12:00 p.m. 10:00 a.m. 11:00 a.m. HSAS - Advanced 3/14/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Transfers and Rollovers 3/23/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Reporting Requirements 3/28/23 11:00 a.m. 12:00 p.m. 10:00 a.m. 2:00 p.m. JULY IRAs: Handling Complex Death Claims 7/11/23 11:00 a.m. 12:00 p.m. 10:00 a.m. 10:00 a.m | IRA Fundamentals | 2/23/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| IRA Required Minimum Distributions 3/9/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. HSAs - Advanced 3/14/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Transfers and Rollovers 3/23/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Reporting Requirements 3/28/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. MAY IRA Issues: Top 10 Wrap-up (2023 Edition) 5/4/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 1 5/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRAs: Is Your Program in Compliance 5/18/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. JULY IRAs: Handling Complex Death Claims 7/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. AUGUST 2023 Legislative Update 8/3/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRA Beneficiary Distributions - Part 1 8/8/23 8:00 a.m. 9:00 a.m. | MARCH | | | | | | |
| HSAs - Advanced 3/14/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. 11:00 a.m. 1RA Transfers and Rollovers 3/23/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. | IRA Contributions and Tax Time | 3/7/23 | 8:00 a.m. | 9:00 a.m. | 10:00 a.m. | 11:00 a.m. | |
| IRA Transfers and Rollovers 3/23/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Reporting Requirements 3/28/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. MAY IRA Issues: Top 10 Wrap-up (2023 Edition) 5/4/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 1 5/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRAs: Is Your Program in Compliance 5/18/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. JULY IRAs: Handling Complex Death Claims 7/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRA Legal Issues AUGUST 2023 Legislative Update 8/3/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRA Beneficiary Distributions - Part 1 8/8/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 2 8/17/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. | IRA Required Minimum Distributions | 3/9/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| IRA Reporting Requirements 3/28/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. MAY IRA Issues: Top 10 Wrap-up (2023 Edition) 5/4/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 1 5/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRA Beneficiary Distributions - Part 2 5/16/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. JULY IRAs: Handling Complex Death Claims 7/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRA Legal Issues 7/13/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. AUGUST 8/3/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. AUGUST 2023 Legislative Update 8/3/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRA Beneficiary Distributions - Part 1 8/8/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 2 8/17/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m.< | HSAs - Advanced | 3/14/23 | 8:00 a.m. | 9:00 a.m. | 10:00 a.m. | 11:00 a.m. | |
| MAY IRA Issues: Top 10 Wrap-up (2023 Edition) 5/4/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 1 5/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRA Beneficiary Distributions - Part 2 5/16/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRAs: Is Your Program in Compliance 5/18/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRAs: Handling Complex Death Claims 7/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRA Legal Issues 7/13/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. AUGUST 2023 Legislative Update 8/3/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. IRA Beneficiary Distributions - Part 1 8/8/23 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 8/10/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 2 8/17/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. | IRA Transfers and Rollovers | 3/23/23 | 8:00 a.m. | 9:00 a.m. | 10:00 a.m. | 11:00 a.m. | |
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| JULY 11:00 a.m. 12:00 p.m. 1:00 p.m. 1:00 p.m. 2:00 p.m. JULY 1RAs: Handling Complex Death Claims 7/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 1:00 p.m. 2:00 p.m. IRA Legal Issues 7/13/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. 11:00 a.m. AUGUST 2023 Legislative Update 8/3/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 1:00 p.m. 2:00 p.m. 1RA Beneficiary Distributions - Part 1 8/8/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. | IRA Beneficiary Distributions - Part 1 | 5/11/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
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| IRAs: Handling Complex Death Claims 7/11/23 11:00 a.m. 12:00 p.m. 1:00 p.m. 2:00 p.m. 11:00 a.m. | IRAs: Is Your Program in Compliance | 5/18/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| AUGUST 2023 Legislative Update 8/3/23 11:00 a.m. 12:00 p.m. 10:00 a.m. 11:00 a.m. | JULY | | | | | | |
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| IRA Trust Beneficiary Issues and How to Handle Them 8/10/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. IRA Beneficiary Distributions - Part 2 8/17/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. | | | | | • | • | |
| IRA Beneficiary Distributions - Part 2 8/17/23 8:00 a.m. 9:00 a.m. 10:00 a.m. 11:00 a.m. | • | | | | | | |
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| | HSA Fundamentals | 8/22/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |

2023 Live Webinar Schedule

| Webinar Name | Date | Pacific Time Zone | Mountain Time Zone | Central Time Zone | Eastern Time Zone | |
|---|------------|----------------------|-----------------------|----------------------|----------------------|--|
| SEPTEMBER | | | | | | |
| HSAs - Advanced | 9/12/23 | 8:00 a.m. | 9:00 a.m. | 10:00 a.m. | 11:00 a.m. | |
| IRAs: Establishing and Amending | 9/14/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| IRAs and Employer Plans: Recognizing Prohibited Transactions | 9/19/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| IRA Fundamentals | 9/26/23 | 1:00 p.m. | 2:00 p.m. | 3:00 p.m. | 4:00 p.m. | |
| IRA Excess Contributions and Recharacterizations | 9/28/23 | 8:00 a.m. | 9:00 a.m. | 10:00 a.m. | 11:00 a.m. | |
| OCTOBER | | | | | | |
| IRA Distributions | 10/17/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| IRA Withholding Rules - And Getting Them Right | 10/24/23 | 8:00 a.m. | 9:00 a.m. | 10:00 a.m. | 11:00 a.m. | |
| NOVEMBER HSAs: Top 10 Wrap-up (2023 Edition) | 11/2/23 | 8:00 a.m. | 9:00 a.m. | 10:00 a.m. | 11:00 a.m. | |
| IRA Reporting Requirements | 11/7/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| IRA Required Minimum Distributions | 11/9/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| HSAs and Medicare | 11/14/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| IRA Transfers and Rollovers | 11/16/23 | 8:00 a.m. | 9:00 a.m. | 10:00 a.m. | 11:00 a.m. | |
| The field and Hollovere | 11, 10, 20 | 0100 011111 | 0100 011111 | 10100 411111 | 11100 411111 | |
| DECEMBER | | | | | | |
| IRAs: Handling Complex Death Claims | 12/7/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |
| Education: Comparing Coverdell ESAs, 529 Plans, UTMAs and UGMAs | 12/12/23 | 11:00 a.m. | 12:00 p.m. | 1:00 p.m. | 2:00 p.m. | |

