

2023 Live Webinar Schedule



Webinar Name	Date	Pacific Time Zone	Mountain Time Zone	Central Time Zone	Eastern Time Zone
JANUARY					
HSA Fundamentals	1/12/23	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
SECURE 2.0 Act	1/18/23	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
FEBRUARY					
2023 Legislative Update	2/2/23	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRAs: 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.
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.	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.
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	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.
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					
HSA - 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					
HSA: 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.
HSA 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.
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, UTMA and UGMA	12/12/23	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.

