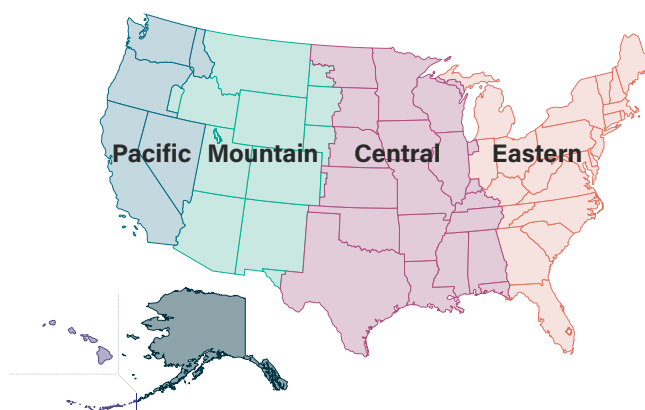


# 2026 Live Webinar Schedule



Webinar Name	Date	Pacific Time Zone	Mountain Time Zone	Central Time Zone	Eastern Time Zone
<b>FEBRUARY</b>					
IRAs: Establishing and Amending	2/3/2026	1:00 p.m.	2:00 p.m.	3:00 p.m.	4:00 p.m.
2026 Legislative Update	2/4/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
HSA Fundamentals	2/5/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
Roth IRAs: What You Need to Know	2/12/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Fundamentals	2/26/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
<b>MARCH</b>					
IRA Contributions and Tax Time	3/3/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Required Minimum Distributions	3/5/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
HSAs – Advanced	3/12/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Transfers and Rollovers	3/19/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Reporting Requirements	3/24/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
<b>APRIL</b>					
IRA Beneficiary Distributions – Part 1	4/30/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
<b>MAY</b>					
IRA Beneficiary Distributions – Part 2	5/5/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Issues: Top 10 Wrap-up (2026 Edition)	5/7/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Amendments - Let's Get Prepared	5/12/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRAs: Is Your Program in Compliance	5/14/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
<b>JULY</b>					
IRAs: Handling Complex Death Claims	7/7/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
Understanding the Legal Side of IRAs	7/9/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
Trusts as Beneficiaries	7/21/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
2026 Legislative Update	7/30/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
<b>AUGUST</b>					
IRA Beneficiary Distributions – Part 1	8/6/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Beneficiary Distributions – Part 2	8/13/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
HSA Fundamentals	8/18/2026	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
<b>SEPTEMBER</b>					
IRAs and Employer Plans: Recognizing Prohibited Transactions	9/2/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
HSAs – Advanced	9/8/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRAs: Establishing and Amending	9/10/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Fundamentals	9/29/2026	1:00 p.m.	2:00 p.m.	3:00 p.m.	4:00 p.m.
<b>OCTOBER</b>					
IRA Excess Contributions and Recharacterizations	10/1/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
IRA Distributions	10/13/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Withholding Rules – And Getting Them Right	10/22/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
HSAs: Top 10 Wrap-Up (2026 Edition)	10/29/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
<b>NOVEMBER</b>					
IRA Reporting Requirements	11/3/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Required Minimum Distributions	11/5/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
HSAs and Medicare	11/10/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.
IRA Transfers and Rollovers	11/12/2026	8:00 a.m.	9:00 a.m.	10:00 a.m.	11:00 a.m.
<b>DECEMBER</b>					
IRAs: Handling Complex Death Claims	12/3/2026	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	12/8/2026	11:00 a.m.	12:00 p.m.	1:00 p.m.	2:00 p.m.



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