A Practitioner’s Guide to IRAs and Qualified Retirement Plans

More and more practitioners are expanding their practices by offering retirement planning advisory services. This course focuses on a variety of issues dealing with IRAs and qualified retirement plans. When practitioners understand the advantages and disadvantages of IRAs and qualified retirement plans, as well as the tax implications and designs of these plans, they are better equipped to meet their clients’ needs.

OBJECTIVE:

At the end of this course, you will be able to:

- Define the different IRAs
- Recognize SEPs, qualified plans, and contribution plans
- List 401(k) plans
- Compare plans
- Identify minimum distribution rules

HIGHLIGHTS:

- Regular IRAs
- Roth IRAs
- Coverdell Education Savings Accounts
- SIMPLE IRAs
- SEPs
- Basics of qualified plans
- Defined benefit pension plans
- Defined contribution plans
- 401(k) plans, including Roth 401(k)s
- Choosing the best plan for each client
- Minimum distribution rules

DESIGNED FOR: CPAs, finance professionals

RECOMMENDED CPE: 8 credit hours

PREREQUISITE: None

EVENT ACRONYM: GIRA

LEVEL: Basic

FIELD OF STUDY: Taxes