

This 3½-hour workshop will discuss the functions of IRAdirect and how to best use the system.

Program Agenda for the IRAdirect Workshop

- **Home Page:** How to navigate and what you'll find.
- **Credit Union and Member Information:** Define what types of information can be viewed.
- **Form Wizards:** How to enter forms on IRAdirect and print them upon completion for the member to sign.
- **Post-70½ Periodic Payment Process:** Describe the steps involved in the process from completing the form wizard to producing the various reports.
- **Death Claim Process:** Explain the process for submitting a death claim using the form wizard and interpreting the death claim screens.
- **Report Production:** Define the process to obtain information as basic as IRA Owner Lists, to Periodic Payment Lists, to Tax Reporting information.
- **Calendar Function:** Discuss the functionality and how it can help the credit union administer its IRA Program more efficiently.
- **User Guide & Manuals:** Locate the IRAdirect User Guide and the various Technical, Operational, and Compliance manuals.