# IRA Staff Training

*Training is an investment that you make in yourself and your staff. It is a vital part of every successful IRA program. Providing staff development opportunities improves member service, adds operational efficiencies, increases employee retention, and helps to make sure your procedures are compliant with IRS regulations.*

Create a culture of professional development at your credit union and focus on the many benefits you'll receive. Ascensus provides training to your staff on a variety of IRA topics through multiple delivery methods. Whether you're new to IRAs or you've been working with them for years, we have a training solution that meets your needs.

## Training That Meets Your Needs

Everyone has a preferred learning style. You may prefer instructor-led classroom settings or you may favor self-paced technology-based instruction. If having flexibility is important to you, Ascensus has several training options.

## Face-to-Face Training

### *IRA Supertrain®*

IRA Supertrain is an intensive three-day IRA training workshop offered across the country each year. All Supertrain instructors are experienced and dedicated industry professionals. Committed to providing credit union staff with an exceptional learning experience, Supertrain's success is the result of blending the right amount of lecture with interactive training workshops. Our many repeat attendees say they consider the IRA Supertrain experience to be key to understanding how to apply the complex IRA compliance rules to daily operational processes. When you attend IRA Supertrain, you can

- customize your curriculum to create a unique learning track that meets your needs,
- consult with our knowledgeable IRA professional trainers, and
- network and share ideas with peers from across the country.

### *League-Sponsored Training*

If you're looking for a one- or two-day session that covers the IRA essentials and/or advanced IRA topics, state league training may be a good fit. We partner with a number of state credit union leagues to offer IRA training workshops near you. Check with your league for training opportunities in your state.

## *Benefits of Training*

- ***Fewer Errors***
- ***Increased Efficiencies***
- ***Reduced Member Turnover***
- ***Increased Revenues***
- ***Reduced Employee Turnover***
- ***Higher Workplace Morale***
- ***Shorter Learning Curve for New Employees***

## *Features*

- Flexible training venues
- Package pricing
- Trainer Toolkit
- Certified IRA Specialist designation

*For additional information, call your Ascensus Representative today!*

*Phone: 800-356-9140*

*www.ascensus.com*

ascensus®

### *In-House Training*

Institutions often consider in-house training when they have a large group that needs IRA training. We can send a trainer to your location and create customized curriculum for you; alternatively we can teach the same one- or two-day workshop that is offered through league-sponsored training.

## Distance Learning

### *Webinars*

IRA rules and regulations are complex, so Ascensus offers timely webinars that provide the essential information you need in a quick, affordable, user-friendly format. These are instructor-led online sessions where participants can interact with the instructor and other attendees. Webinar topics range from introductory compliance concepts to more advanced topics like processing death claims and Roth IRA conversions.

### *IRA University*

This 5-week course blends webinars and eLearning to provide you with the tools to build a solid IRA knowledge base. It also qualifies you to become certified as an IRA Specialist at the Associate level. IRA University combines one 90-minute webinar session each week with 24-hour access to the on-demand training materials. A blended approach gives you the flexibility to build skills you can apply today and into the future, without the travel expense.

### *eLearning*

Take complete control of your training with eLearning. This online, on-demand style of learning lets you determine the time and pace for instruction and is designed to educate staff at all levels. eLearning is a cost effective and streamlined way to access training when it fits your schedule.

### *Trainer Toolkit*

The trainer toolkit is appropriate if you have an internal training department at your institution. The trainer toolkit comes with two components: IRA Basics and the Road to Retirement game. IRA Basics consists of compliance-approved participant guides, facilitator guides, and a PowerPoint® presentation. All IRA essentials are covered, including eligibility, account opening, contributions, withdrawals, and more. The Road to Retirement game provides an interactive activity where participants can review and apply what they learned in IRA Basics.

## *The Certified IRA Specialist Program*

Create a culture of professional development at your credit union by earning your Associate level or Expert IRA Specialist certification. By joining this select group of credit union professionals, you'll enhance your credibility within the credit union, while proving your knowledge, experience, and commitment to the IRA program. A certification is especially appropriate if you have primary responsibility for your credit union's IRA program.

## *Package Pricing*

Take advantage of reduced rates when you purchase a training package. You can purchase a series of webinars or eLearning modules, or create your own custom package.

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