

## Focused Topics for the Experienced Practitioner Web Seminar Series

### *Mondays with Derrin and Steve*

**New topics for 2014!** Our two most experienced speakers, Derrin Watson and Stephen Forbes, have identified 12 new topics with which experienced practitioners continue to struggle and need to understand. Don't have time for a two-hour webcast? Don't have time to read the regulations and the other guidance on a topic? Need to learn (or review) the mechanics of a specific topic?

Steve and Derrin have designed a new series of Web seminars that build on your experience and conserve your limited time. The presentations target the concepts you need to apply the specific topic.

**Plan to join us on Monday, March 24, 2014,** for the first of these 60-minute presentations.

#### **Topics** (in order of presentation):

- |                                                     |                                                        |
|-----------------------------------------------------|--------------------------------------------------------|
| 1) Average Benefit Test: A Closer Look              | 7) Retirement Plans: Mergers and Acquisitions          |
| 2) Nondiscrimination Testing With Related Employers | 8) The Ethics of Retirement Plan Practice              |
| 3) Benefits, Rights, and Features                   | 9) Roth Rollovers and Distributions                    |
| 4) Troubleshooting Cross-tested Plans               | 10) Prohibited Transactions: Who, What, Why & Why Not? |
| 5) Resolving Loan Errors Under EPCRS                | 11) Compensation: Allocation vs. Testing               |
| 6) RMDs: Calculating Lifetime and Death RMDs        | 12) Automatic Enrollment and Escalation Provisions     |

#### **Advantages of attending this Focused Topic Series:**

- Topics an experienced practitioner must understand, presented in the comfort of your office.
- Pick and choose the topics you need or attend all 12 for a reduced price.
- Designed to meet attendees' Continuing Education requirements for ASPPA, NIPA, ERPA and other professional designees: 1 hour for each session, including 1 Ethics hour.

#### **Fees**

Each 60-minute session is affordably priced at \$94 for the primary registrant and \$40 for additional registrants who agree to view in a group setting via the primary registrant's authorized connection. To register for individual segments only, visit our Web seminars calendar (click or copy/paste):

<http://www.relius.net/Events/events.aspx?Web>

*SmartPass Subscribers: Pursuant to the "Conditions of SmartPass Use" on our [website](#), SmartPass may not be applied to this or any other Web Seminar series.*

**Special Bundled Offer!** Register for nine of the 12 segments, and the last three segments are free for the primary registrant! That's a 25% savings off the segment-by segment registration fee. Additional registrants on the same form continue to save with the reduced fee of \$40 each.

**To take advantage of this offer,** forward your email confirmation that shows your registration for nine segments to [relius.education@sungard.com](mailto:relius.education@sungard.com) with "Bundle my Focused Topics" in the subject line, and receive an email with instructions for registering for the last three segments at no charge.

#### **Scheduling Conflicts?**

For those who opt for the 12 bundled segments and then learn you have a conflict with a scheduled date, we provide access to the recorded\* version of those segments you miss. If you miss some of the first segments and later decide that would like to bundle all 12 for the discounted fee, we offer a bundled combination of live and recorded\* segments.

\*Due to the inability to track participation, Continuing Education credits are not available for recorded Web seminars.

**Don't delay – register now!**

**Questions?** Email us at [relius.education@sungard.com](mailto:relius.education@sungard.com) and we will respond promptly.