www.IRAstuff.com

News Stuff · Learn Stuff · Reference Stuff · Fun Stuff

*Introducing an **exceptionally cost-effective,** all-in-one, IRA training and resource portal.*

News

Want to know what's happening in the world of IRAs? IRAstuff™ is your up-to-date, go-to news resource. With daily updates covering everything from legislative and regulatory changes to industry events and gatherings, IRAstuff™ helps your organization stay up-to-date and compliant.

Afraid you might miss an important change or development? No need to worry. With IRAstuff™ you can choose to receive proactive e-mail alerts whenever significant IRA changes are in the works.

Education

In a perfect world, financial organizations would provide each employee with just the right amount of IRA training at just the right time of year, depending on his or her job responsibilities. Historically speaking, such an approach has been nonexistent or too costly. Not anymore. With over 30 interactive, self-paced courses from which to choose (ranging from entry-level to advanced), IRAstuff™ provides the perfect blend of courseware to meet the needs of all associates. What's more, the courses can be accessible to all employees throughout the organization so everyone can have access to the training they need, when they need it.

Thanks to IRAstuff's fully integrated course assignment and tracking functionality, managers and team leaders can leverage the administrative tools within IRAstuff™ to ensure all associates are being exposed to just-in-time training resulting in increased compliance and operational consistency throughout the organization.

Interactive Tools & Resources

In today's fast-paced work environment, financial professionals are hungry for tools and resources that increase efficiency and reduce stress. IRAstuff™ contains job aids and interactive tools designed by IRA experts with decades of industry experience. These resources not only help to reduce employee stress and frustration, but also serve to increase customer service as well as operational compliance and consistency.

- ✓ ***Interactive Beneficiary Options Tool*** for determining the distribution options available to IRA beneficiaries (including 36 different, dynamically-selected, beneficiary options brochures)
- ✓ ***12 Desktop Job Aids*** help answer the most common IRA questions (e.g., required minimum distributions, excess contribution corrections, IRS reporting, IRA transfers and rollovers, beneficiary distributions, and more)
- ✓ ***Interactive Excess Contributions Tool*** that easily calculates the "earnings attributable" when removing (or recharacterizing) an excess IRA contribution

Reference

Financial professionals also need access to resources that enable them to quickly find answers to tough client questions. IRAstuff™ goes beyond typical reference tools, providing an array of intuitively arranged reference materials designed to fit each user's unique needs (from entry-level to seasoned veteran).

- ✓ Comprehensive 200+ page ***IRA Compliance & Operations Manual***
- ✓ Over ***600 FAQs*** *(*frequently asked questions*)* with direct hotlinks to pertinent IRS rules and regulations
- ✓ Up-to-date versions of ***virtually every IRA-related source document*** (including code/regulations, IRS pronouncements, reporting forms and instructions, IRS publications, private letter rulings, etc.)

Questions?

Give us a call.

218-824-4900