



Banking Compliance

IRA, HSA, and CESA: “On-Demand” Training Options

Wolters Kluwer is offering the following convenient solutions to help you educate your staff in this often complex world of tax-advantaged accounts

Single session on-demand streaming video training

On-demand streaming training brings our in-person training environment directly to your computer or training room via any internet-connected device. There's no need to wait for training to be scheduled in your area, and employees no longer have to be away from the office to attend and learn. This option is available to everyone, everywhere, at any time.



To gather more information on the classes offered or to purchase a single session, visit this [link](#).



For more information on our on-demand streaming subscription, please contact your Wolters Kluwer Account Representative. If you need assistance, please call 1-800-552-9410 and select option 2 to obtain your assigned Content Representative's information or email our support team at customersupport@wolterskluwer.com.

On-demand streaming subscription

With an on-demand live streaming subscription, you will have access to 14 pre-recorded live streaming trainings that you can watch at any time and anywhere. The subscription allows you to have access to these training sessions for 12 months, starting on your contract date. There is no limit to the number of employees that can view these sessions or how many times these on-demand training sessions are viewed.

Get to know our trainers

With over 160 years of combined experience in tax-advantaged accounts, our experts have put together a portfolio of on-demand training sessions covering Individual Retirement Arrangement (IRA), Health Savings Account (HSA), and Coverdell Education Savings Accounts (CESA).



Steve LeRoux
Senior Specialized
Consultant,
Tax-Advantaged Accounts



Robert Skomars
Senior Specialized
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Michael Schiller
Manager,
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Carlene Carter
Senior Specialized
Consultant,
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James Hrycyna
Senior Specialized
Consultant,
Tax-Advantaged Accounts

Your subscription includes all of these sessions, so you don't need to worry about not having access to the training you need, when and where you want it

180 minutes

Basic (IRA) training

- Overview and establishment
- Contribution eligibility
- Distribution basics
- IRA-to-IRA rollovers and transfers

Intermediate IRA training - Part one

- Regular contributions
- Distributions
- Required minimum distributions

Intermediate IRA training - Part two

- Beneficiary options
- Rollovers, transfers, and conversions
- Employer plan-to-IRA rollovers

Advanced IRA training

- Required distribution administration
- Death distributions and IRA administration
- Employer plan rollovers

HSA training

- Overview and establishment
- Regular contributions
- Distributions
- Rollovers and transfers
- Special topics
- IRS reporting

120 minutes

IRA documentation training

- Establishment
- Contributions
- Distributions
- Portability

90 minutes

Beneficiary IRA administration training

- The importance of providing adequate attention to an IRA after an owner's death
- Administering an IRA after an owner's death
- Beneficiary IRA reporting

Roth IRA training

- Overview and establishment
- Contribution eligibility
- Distributions
- Beneficiary options

60 minutes

IRA reporting training

- Understanding and interpreting different reports
- Reporting responsibilities
- Reporting deadlines

IRA self-audit training

- Operating a compliant IRA program
- Establishment documents and disclosures
- Proper and timely reporting

IRA policies and procedures training

- The importance of having written policies
- Items that a financial organization may wish to address via a specific policy
- The importance of having procedures in place for both common and uncommon IRA-related issues

Simplified Employee Pensions (SEP) training

- The relationship between a SEP and an IRA
- A financial organization's role as it applies to SEPs
- The benefits of a SEP and the reasons why many employers offer them

CESA training

- How a CESA differs from other deposit accounts
- Designated beneficiary and contributor eligibility rules
- Properly administering CESAs

Required Minimum

Distributions (RMD) training

- The components necessary to calculate an RMD
- RMD aggregation, rollovers and transfers, and taxation
- Penalties and reporting
- Options for satisfying the annual RMD statement requirement

About Wolters Kluwer Financial & Corporate Compliance

Wolters Kluwer (EURONEXT: WKL) is a global leader in information solutions, software and services for professionals in healthcare; tax and accounting; financial and corporate compliance; legal and regulatory; corporate performance and ESG. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with technology and services.

Wolters Kluwer reported 2024 annual revenues of €5.9 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 21,600 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands.

Wolters Kluwer shares are listed on Euronext Amsterdam (WKL) and are included in the AEX, Euro Stoxx 50, and Euronext 100 indices. Wolters Kluwer has a sponsored Level 1 American Depositary Receipt (ADR) program. The ADRs are traded on the over-the-counter market in the US (WTKWY).

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