Get the information you need about IRAs

— and now HSAs, too —

when and where you need it.

Subscribe to one or both training and resource portals today to gain 24/7 access to IRA and/or HSA training content, reference materials, and performance support gadgets.

The news you need, when you want it.

Want to know what's happening in the world of IRAs and HSAs? IRA Stuff and HSA Stuff give you up-to-date news on the topics you need now. With regular updates covering everything from legislative and regulatory changes to industry events and gatherings, the IRA Stuff and HSA Stuff portals help your organization stay up to date and compliant. Afraid you might miss an important change or development? No need to worry. With IRA Stuff and HSA Stuff you will receive* proactive e-mail alerts whenever significant changes are in the works. **May opt out*

On demand, self-paced courseware on IRA and HSA compliance and operations topics.

In a perfect world, financial organizations would provide staff with just the right amount of IRA and HSA training at just the right time of year, depending on their job responsibilities. Until now, such an approach has been nonexistent or too costly. Not anymore. With over 30 IRA and HSA interactive, self-paced courses from which to choose (ranging from entry-level to more advanced topics), IRA Stuff and HSA Stuff provide the perfect blend of courseware for all associates. Employees throughout the organization may access the courses, giving them the training they need, when they need it.

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

Just-in-time performance support with helpful stuff like interactive tools and resources.

In today's fast-paced work environments, financial professionals are hungry for tools and resources that increase efficiency and reduce stress. IRA Stuff and HSA Stuff contain job aids, charts and interactive tools designed by 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 tools for determining the distribution options available to IRA beneficiaries (including 36 different dynamically-generated beneficiary options take-aways); as well as for calculating beneficiaries' life expectancy payments.
- Desktop Job Aids help answer the most common questions about IRAs and HSAs like questions about calculating RMDs, correcting excess contributions, completing IRS and account owner reporting, transfers, rollovers, beneficiary distributions and more.
- Interactive excess contributions tool that easily calculates the "earnings attributable" when removing an IRA or HSA excess contribution, or recharacterizing an IRA contribution.

At-your-fingertips, organized reference materials.

Financial professionals also need access to resources that allow them to quickly find answers to tough client questions. IRA Stuff and HSA Stuff go beyond typical reference tools, providing an array of intuitively arranged reference materials to fit each user's unique needs (from entry-level to seasoned veteran).

- Comprehensive compliance and operations manuals
- Hundreds of FAQs (frequently asked questions) with direct hotlinks to pertinent IRS rules and regulations
- Up-to-date versions of the IRA and HSA-related source documents (including code/regulations, IRS pronouncements, reporting forms and instructions, IRS publications, private letter rulings, etc.)

Convergent Retirement Plan Solutions, LLC

Questions?

Give us a call.

218-824-4900