

**IRA SERVICES**

Compliance and Administrative Support for your IRA Program.

# IRA Staff Training

**Staff training 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 government regulations. ●

You can receive training 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 for you.

**Training That Meets Your Needs**

Everyone has a preferred learning style. You may prefer a classroom setting with a trainer teaching a group of students. Or you may favor technology-based instruction where you can control the training from your PC. Flexibility is important, so we have several options for you:

**IRA Supertrain®**

IRA Supertrain is a three-day, IRA training workshop offered at various sites across the country each year. Our many repeat attendees consider the IRA Supertrain experience to be extremely valuable. When you attend IRA Supertrain, you can:

- Customize your curriculum by creating a unique learning track that meets your needs.
- Consult with our professional, knowledgeable IRA trainers.
- 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, league training may be a good fit. We partner with a number of state credit union leagues to offer IRA training workshops. Check with your league for training opportunities in your state.

**Webinars**

Learn right from your office with our instructor-led, online sessions. IRA rules and regulations are complex, so we offer up-to-date webinars that provide the essential information you need in a quick, affordable, easy-to-use format.

A key feature of our webinars is that they are interactive - participants can give, receive and discuss information. In addition to webinars on both introductory and advanced compliance topics, we offer operational webinars for IRADirect® users.

**eLearning**

Take complete control of your training with eLearning. This online, on-demand style of learning allows you to determine when to start, stop, pause or revisit a topic. Our eLearning modules are designed to educate staff at all levels. It's a budget-friendly way of accessing training when it fits your schedule.

**Realize the Benefits of Training**

Training is an investment that you make in yourself and your staff. Create a culture of professional development at your credit union by focusing on the benefits of training:

- Fewer Errors
- Increased Efficiencies
- Reduced Member Turnover
- Increased Revenues
- Reduced Employee Turnover
- Higher Workplace Morale
- Greater Productivity of New Employees

**Package Pricing**

Take advantage of reduced rates when you purchase a training package. Educate your staff by purchasing a series of webinars or eLearning modules. You can even mix in a Supertrain or IRA University to create your own custom package. Contact us and we will work with you to find a training package that meets your needs. ●●●●

### In-House Training

Let us provide you a trainer to train your staff at your facility. We can create a customized curriculum for you or we can use the same one- or two-day workshop that is offered through league-sponsored training. Consider in-house training if you have a large staff that needs IRA training.

### IRA University

This 5-week blended course of webinars and eLearning will provide you with the tools to build a solid IRA knowledge base and become certified as an IRA Specialist at the Associate level. Throughout the course, you will have one 90-minute weekly webinar session and 24-hour access to the on-demand training portions of the course.

This blended approach gives you the flexibility to build skills for your IRA success today, and into the future, without the travel expense.

### IRA Center

IRA Center is a customizable, online solution that provides your members and staff with IRA and retirement planning content and functionality through your credit union Web site. IRA Center serves as a great reference tool for frontline staff. Use the links to educational articles, planning tools, and calculators to get new staff comfortable with IRAs.

### Trainer Toolkit

If you facilitate training for your staff, our trainer toolkit is for you. 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 of the IRA essentials are covered, including eligibility, opening an IRA, contributions, withdrawals, and more.

Also included in the trainer toolkit is a Road to Retirement game, which provides participants with an interactive activity where they can review and apply the material learned in IRA Basics.

### The Certified IRA Specialist Program

You can promote your IRA program and provide high quality service to members by earning your Certified IRA Specialist designation. By joining this select group of credit union professionals, you'll enhance your credibility while strengthening your program. If you have primary responsibility for your credit union's IRA program, the Certified IRA Specialist program is for you.

### Take the Next Step

For more information on our training opportunities or our Certified IRA Specialist program, contact IRA Services at **800.356.9140**. To view our current training offerings, visit us online at **[www.cunamutual.com/IRAtraining](http://www.cunamutual.com/IRAtraining)**



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