NEED IRA TRAINING?

We bring the training to your organization

From basic to more advanced topics, we can design the training sessions according to your needs and schedule.

Examples:*

Introduction to IRAs | IRA Contributions | Transfers and Rollovers
Self-directed IRA issues | Estate and Trust issues | RMDs and Beneficiary Options
Conversions | IRA Distribution and Taxation | Reporting Requirements
IRA Academy (CISP curriculum)

Meet your instructor, industry luminary, John Paul Ruiz

John Paul Ruiz holds over 27 years of experience in the retirement and financial services industries. Previously, he served as Vice President of Professional Development for Integrated Retirement Initiatives, LLC.

John Paul has also gained valuable retirement plan acumen from his roles at Ascensus, the IRA Institute, and the American Bankers Association, among others.

To complement his extensive career within the retirement and finance industries, John Paul holds QKA and CISP certifications. He can help your organization remain compliant with ERISA regulations and offer unique insights about the retirement industry, enabling your team to better serve its most valued clients.

Contact us for a quote:

John Paul Ruiz, QKA CISP | Ruiz Retirement Plan Consulting

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*Courses qualify for continuing education credits for most industry designations such as CISP, CTFA, CRSP.