

# NEED IRA TRAINING?

We can 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 the instructor, industry luminary, John Paul Ruiz


John Paul Ruiz brings to the team over 25 years of experience in the retirement and financial services industries. Before joining Entrust, he served as Vice President of Professional Development for Integrated Retirement Initiatives, LLC.

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

To complement his extensive career within the retirement and finance industries, John Paul holds QKA and CISP certifications. He joins the Entrust team to help us remain compliant with ERISA regulations, and to offer valuable insights about the retirement industry so that we can better serve our clients.

### Contact us for a quote:

John Paul Ruiz | Director of Professional Development

 800.392.9653 x360

 [jpruiz@theentrustgroup.com](mailto:jpruiz@theentrustgroup.com)

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