

## Webcast Acronym: SOCS-LSEC

**Webcast Title:** Social Security – Part 3 Of 60+ Clients Series

**Recommended CPE Hours:** 2 CPE Credit Hours.

### **Highlights:**

Come join Larry Stein as he discusses Social Security retirement benefits. Larry will focus on when to take Social Security, estimating benefits, spousal benefits, eligibility, and taxation of Social Security benefits.

### **Learning Objectives:**

Upon the successful completion of this webcast, the participants will be able to:

1. Explain the eligibility criteria for Social Security retirement benefits.
2. Explain spousal Social Security retirement benefits.
3. Explain how to estimate Social Security retirement benefits.
4. Explain the taxation of Social Security benefits.

### **Major Topics:**

- Social Security Eligibility.
- When To Take Social Security – Full Retirement Age Versus Early Retirement.
- Social Security Benefits – Spouse And Family.
- Estimating Retirement Benefits.
- Taxation Of Social Security Benefits.

**Designed For:** CPAs with at least six (6) years of experience. You must have a basic knowledge of federal taxation.

**NASBA Fields Of Study:** Taxes.

**Level:** Specialized Knowledge.

**Presentation Method:** Live Webcast Lecture With Questions And Answers.

**Recommended CPE Credit Hours:** 2 CPE credit hours.

**Advanced Preparation:** Basic knowledge of federal taxation.

**Texas Registration:** 009838

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Larry Stein CPE Live Webinars  
ID# 109111  
Lawrence J Stein  
9620 NW 82nd Street  
Tamarac, FL 33321  
Phone: 954.721.5588  
Group Internet-Based

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