

Webcast Acronym: 60CL-Pt1

Webcast Title: Larry Stein's 2015 Tips And Strategies To Give Your 60+ Client A Check-Up – Social Security, Medicare, Long-Term Care, Estate And Tax Planning – Part One

Recommended CPE Hours: 4 CPE Credit Hours.

Highlights:

Come join Larry Stein as he discusses key tips and strategies for your clients over age 60. In Part One (of this two-part webcast), Larry will discuss Social Security Ideas, Medicare Strategies, Basis, and Income Tax Planning Moves for this client group. Personal residence planning will also be highlighted. The 60+ client segment is growing rapidly – gain new strategies to serve this client niche!

Learning Objectives:

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

1. Explain **selected** basis provisions under the tax code.
2. Explain the homesale exclusion rules.
3. Explain **selected** Social Security ideas.
4. Explain **selected** Medicare strategies.

Major Topics:

- Basis – Strategies And Moves.
- Income Tax Planning – 60+ Clients.
- Personal Residence – Homesale Exclusion, Qualified Residence Interest, And More!
- Social Security And Medicare – Key Insights And Strategies.

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: Intermediate.

Presentation Method: Live Webcast Lecture With Questions And Answers.

Recommended CPE Credit Hours: 4 CPE Credit Hours.

Advanced Preparation: Basic knowledge of federal taxation.

Prerequisites: Basic knowledge of federal taxation.

Texas Registration: 009838

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