

Webcast Acronym: 60CL-Pt2

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 Two**

Recommended CPE Hours: 4 CPE Credit Hours.

Highlights:

Come join Larry Stein as he discusses practical strategies and ideas for your clients over age 60. In Part Two (of this two-part webcast), Larry will focus on long-term care planning and insurance, wealth planning, and asset protection ideas Don't miss out on this high-yield CPE course!

Learning Objectives:

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

1. Explain what to look for in advising a client on purchasing long-term care insurance.
2. Explain long-term care options.
3. Explain **selected** gift tax planning and compliance tax matters.
4. Explain **selected** marital portability estate planning concerns.
5. Explain **selected** considerations in beneficiary designation planning for IRAs.

Major Topics:

- Long-Term Care, Retirement Tax Planning, And Eldercare.
- Business Succession Planning (Includes Professional Practice, Farm, And Ranch Succession).
- FBAR, FACTA, Reportable Transactions, Life Insurance – 60+ Client Tax Issues.
- Gift And Estate Planning – Where To Focus Now.
- Beneficiary Designations – Qualified Plans, IRAs, And Life Insurance.

- Roth IRAs – Conversions – Factors To Consider.
- Asset Protection For Your 60+ Clients – Five Key Ideas.

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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