

**Webcast Title:**        **Giving Your 60+ Client A Check-Up: Larry Stein's Guide To Tax, Estate, And Wealth Planning For Your Client Over 60**

**Recommended CPE Hours:**        **8 CPE Credit Hours.**

**Highlights:**

Come join Larry Stein for this eight (8) hour course where he will discuss selected tips and strategies for clients over age 60. Today's top estate, tax, wealth planning, and retirement planning ideas will be covered. Also, key Social Security, Medicare, and succession planning moves will be highlighted.

**Learning Objectives:**

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

1. Explain selected estate and wealth planning strategies.
2. Explain selected long-term care and retirement planning strategies.
3. Explain selected Social Security insights and Medicare moves.
4. Explain selected income tax and net investment income tax strategies.

**Major Topics:**

- Marital Portability, Trust Designs, And Today's Estate Planning Environment.
- Exit Tax Strategies – Selected Concerns; Non-Tax Considerations.
- Long-Term Care Planning; Long-Term Care Insurance.
- Retirement Tax Planning – Selected Ideas.
- Social Security And Medicare – Selected Key Strategies.
- IRAs (Traditional And Roth); Roth 401(k); Selected Considerations.
- Selected Income Tax And Net Investment Income Tax Planning Moves.

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

**NASBA Fields Of Study:** Taxes – 4 Hours/Management Advisory Services – 4 Hours.

**Level:** Intermediate.

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

**Recommended CPE Credit Hours:** 8 CPE credit hours.

**Advanced Preparation:** Basic knowledge of federal taxation and estate planning.

**Texas Registration:** 009838

“I have registered with the Texas State Board of Public Accountancy as a CPE sponsor. This registration does not constitute an endorsement by the Board as to the quality of my CPE program.”

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