

Webcast Acronym: LSEC-8hr.

Webcast Title: **Giving Your 60+ Client A Check-Up – Tax/Estate Planning, Succession Strategies, Social Security, Medicare, And Long-Term Care Insights**

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

Highlights:

Come join Larry Stein as he discusses tips and strategies to give your 60+ client a check-up. Top tax planning tips and long-term care insights (including retirement planning) will be featured. Also, succession strategies and moves will be highlighted. Larry will also cover Social Security and Medicare tips.

Learning Objectives:

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

1. Explain selected Medicare, Social Security, and long-term care planning strategies.
2. Explain selected retirement tax planning strategies.
3. Explain selected estate and wealth transfer tax strategies.
4. Explain selected income tax planning strategies.

Major Topics:

- Retirement Tax Planning – NUA, IRAs, HSAs, The New 3.8% Medicare Tax, And More!
- Estate Planning – Trusts And More!
- Succession Strategies And Exit Tax Planning Technical Issues.
- Capital Gains, Qualified Dividends, And The New Tax Landscape.
- Long-Term Care Planning And Retirement Planning – Five (5) Key Moves.
- Social Security – Five (5) Top Tips.
- Medicare – Three (3) Key Insights.

- IRAs And Life Insurance – Naming Beneficiaries.

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 – 4 hours; Specialized Knowledge – 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.

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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