Webcast and Seminar Acronym: LSEC

Title: **Larry Stein's 2016 Tips And Strategies To Give Your 60+ Client A Check-Up - Social Security, Medicare, Long-Term Care, Estate And Tax Planning**

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

Highlights:

Come join Larry Stein as he discusses key ideas and strategies for your clients over age 60. Social Security, Medicare, Basis, Income Tax Moves, Personal Residence Planning, and Capital Gains Planning will be the focal points in the first half of the course. In the second half of this course, Long-Term Care, Wealth Planning, and Estate Preservation will be the focal points.

Learning Objectives:

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

1. Explain **selected** Social Security changes.
2. Explain how to choose a "Medigap" Policy.
3. Explain **selected** Social Security ideas.
4. Explain **selected** Medicare strategies.
5. Explain **selected** basis strategies under the tax code.
6. Explain **selected** income tax planning strategies for the 60+ client.
7. Explain **selected** personal residence tax and non-tax issues, concerns, and solutions.
8. Explain long-term care options.
9. Explain **selected** estate and gift tax planning techniques (including marital portability estate planning).
10. Explain **selected** considerations in beneficiary designations for IRAs.

Major Topics:

Part One (Basis, Income Tax Planning, Social Security, Medicare, And Personal Residence Planning)

- Basis - Over Four Key Tips.
- Income Tax Planning - Selected Tips For The 60+ Client.
- Personal Residence Planning - Selected Tips.
- Retirement Planning; Resources.
- Social Security - How Will The New Rules Impact Retirement Planning.
- Medicare - The Growth Of Medicare Advantage Programs; How To Choose A Medigap Policy!

Part Two (Long-Term Care, Estate Planning, Asset Protection)

- Long-Term Care Insurance And Long-Term Care Options.
- Business Succession Planning - Selected Concerns.
- Gift And Estate Planning - Selected Focal Points.
- Beneficiary Designations - IRAs; Life Insurance.
- FACTA/FBAR - Selected Developments And Case Law.
- Estate Management, Asset Protection, And Wealth Preservation.

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 Lecture With Questions And Answers.

Recommended CPE Credit Hours: 8 CPE credit hours.

Advanced Preparation: Basic knowledge of federal taxation.

Prerequisites: Basic knowledge of federal taxation.

NOTE: Each of my 2016 eight (8) CPE credit seminars will be broken down into four (4) hour webcasts. The "Part One" topics will be covered in one four hour webcast event and the "Part Two" topics will be covered in another (second) webcast event. If you have any questions, please email Larry Stein at taxman532@hotmail.com.

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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