

Webcast Acronym: LSPL

Webcast Title: Larry Stein's Technical Strategies To Establish And Grow Your Eldercare, Retirement, And Estate Planning Practice

Recommended CPE Credit Hours: 8 CPE Credit Hours.

Highlights:

Come join Larry Stein as he discusses technical strategies and ideas to establish and grow your eldercare, retirement, and estate planning practice. Eldercare, retirement, and estate planning engagements will be highlighted and examined.

Learning Objectives:

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

1. Explain **selected** long-term care planning strategies.
2. Explain **selected** IRA strategies.
3. Explain **selected** estate planning ideas.
4. Explain **selected** retirement planning ideas.

Major Topics:

- **Eldercare** – Long-Term Care Planning And More.
- **Retirement Planning** – IRAs, Qualified Retirement Planning, Reverse Mortgages, And More!
- **Estate Planning** – Strategies For The Everyday Client.
- **Tax Form Compliance Issues** – 1040, 1041, 709, 706, Etc.
- The Impact Of The **Windsor** And The **Perry** U.S. Supreme Court Cases.
- Standards, Resources, 529 Plans, Life Insurance, Long-Term Care Insurance, Living Trusts, And More!

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

NASBA Fields Of Study: Management Advisory Services.

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

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