

Webcast Title: Long-Term Care And Retirement Planning

Recommended CPE Hours: 4 CPE Credit Hours.

Highlights:

Come join Larry Stein as he discusses key tips and strategies for long-term care planning and retirement planning. Options for long-term care, funding care, long-term care insurance, retirement accumulation, retirement withdrawals, and more will be covered.

Learning Objectives:

Upon the successful completion of this webcast, the participants will be able to explain selected long-term care planning and retirement planning strategies.

Major Topics:

- Options For Long-Term Care.
- What Is Long-Term Care?
- How To Plan For Long-Term Care Needs.
- How To Fund And Pay For Retirement And Long-Term Care Needs.
- Long-Term Care Insurance – What To Look For In A Policy.
- Continuing Care Retirement Communities.
- Where To Find Information.
- Retirement Accumulations – How Much Do I Need To Retire?
- Retirement Planning – Some Key Decisions.
- Retirement Withdrawal Rates – Has The World Changed?
- Traditional Vs. Roth IRAs; Other IRA Issues.

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

NASBA Fields Of Study: Management Advisory Services.

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, retirement planning, and eldercare.

Texas Registration: 009838

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