

Webcast and Seminar Acronym: RP16

Title: Retirement Planning - Key Steps

**Recommended
CPE Hours:** 2 CPE Credit Hours.

Highlights:

Come join Larry Stein as he discusses key steps in the retirement planning process.

Learning Objectives:

Upon the successful completion of this CPE Event, the participants will be able to explain selected key steps in the retirement planning process.

Major Topics:

- Social Security - Key Changes.
- Retirement Planning - Selected Resources.
- Key Steps - Retirement Planning.
- Checking Out Advisors.

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

NASBA Fields Of Study: Management Advisory Services.

Level: Intermediate.

Presentation Method: Live Lecture With Questions And Answers.

Recommended CPE Credit Hours: 2 CPE credit hours.

Advanced Preparation: Basic knowledge of federal taxation, Social Security, and retirement planning.

Prerequisites: Basic knowledge of federal taxation, Social Security, and retirement planning.

NOTE: 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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