**Webcast and Seminar Acronym: RW16**

**Title:** **Larry Stein's 2016 Essential Strategies For Retirement Wealth**

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

**Highlights:**

Come join Larry Stein as he discusses key strategies and moves for your clients' retirement wealth. Today's top ideas and tips will be presented including strategies for IRAs, Roth IRAs, qualified retirement plans, and more. With 10,000 "baby boomer" retirements each day, this is a high-yield CPE opportunity.

**Learning Objectives:**

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

1. Explain **selected** tax aspects of Traditional IRAs.
2. Explain **selected** tax aspects of Roth IRAs.
3. Explain the impact of **selected** new Social Security rules on retirement planning.
4. Explain the differences between SIMPLE IRAs vs. SEP IRAs.
5. Explain **selected** key Net Investment Income Tax Rules that may impact retirement planning.
6. Explain selected key retirement distribution planning and compliance strategies.

**Major Topics:**

**Part One (Retirement Planning, IRAs, Variable Annuities, And Advisors)**

- Key Steps - Retirement Planning Process.
- The Role Of Longevity, QLACs, And Other Developments.
- Traditional IRAs - Selected Moves.
- Roth IRAs - Selected Developments And Proposals; Roth IRA Conversions.
- Variable Annuities - Selected Resources And Developments.

- Checking Out Advisors.

- Impact Of New Social Security Rules.

**Part Two (Net Investment Income Tax, Succession Planning, Retirement Vehicles, Retirement Distributions)**

- SIMPLE IRAs Vs. SEP IRAs.

- Net Investment Income Tax Rules.

- Schedule D, Form 1040 Concerns.

- Succession Planning - Preserving Wealth.

- Estate Planning For Retirement.

- Retirement Distributions - Selected Planning And Compliance Solutions.

- The Impact Of **Obergefell** Supreme Court Case.

**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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