

Webcast and Seminar Acronym: SOCT

Title: Social Security - Key Tips And Claiming Strategies

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

Highlights:

Come join Larry Stein as he discusses Social Security retirement benefits. Larry will focus on Social Security claiming strategies. Resources for analyzing Social Security decision-making will also be emphasized. Don't miss out on this high-yield 2-hour CPE Event.

Learning Objectives:

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

1. Explain the factors for claiming Social Security retirement early at age 62 vs. at Full Retirement Age (FRA).
2. Explain the impact of delayed retirement credits on Social Security Retirement Benefits.
3. Explain the factors as to when to collect (take) Social Security Retirement Benefits.
4. Explain selected resources available to analyze Social Security Retirement Benefits.

Major Topics:

- Collecting Social Security - Selected Thoughts.
- Social Security - Breakeven Points.
- Social Security - Taking Benefits Early Vs. Waiting.
- When To Collect Social Security - Resources.
- How Social Security Benefits Are Computed - CRS Reports - Key Components.
- Taking Early - The Pitfalls.
- Delayed Retirement Credits.

- Other Strategies.

Designed For: CPAs with at least six (6) years of experience. You must have a basic knowledge of Social Security.

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 Social Security.

Prerequisites: Basic knowledge of Social Security.

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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