

You are cordially invited to attend an educational workshop on...

Savvy Social Security Planning: What CPAs, Attorneys, and Other Professionals Need to Know About Social Security Claiming Strategies

Presented By: Randy Luebke

Date: Thursday, July 15, 2021 at 12:30 PM Pacific

Location: Virtual Workshop

Social Security can be far more complicated than people realize. The decisions your clients make now can have a tremendous impact on the total amount of benefits they receive over their lifetime.

This one-hour workshop will acquaint CPAs and attorneys with rules and strategies for claiming Social Security benefits. An emphasis will be placed on coordinating the various types of benefits (retirement, spousal, and survivor) in order to maximize benefits over a client's lifetime.

After completing this course, you will know:

- How Social Security benefits are calculated
- Factors clients need to consider when deciding to apply for benefits
- Illustrations of lifetime income streams based on claiming ages and breakeven analyses
- Innovative spousal claiming strategies designed to give clients extra income
- How widows and widowers can coordinate survivor benefits with their own retirement benefit to maximize income
- Ways to minimize taxes on Social Security benefits
- How to coordinate Social Security with other sources of retirement income

Workshop Policies

Cancellation policy: This workshop is free. Please contact the presenter to cancel.

To make a complaint, or for more information about program cancellation policies, please call Horsmouth Member Support at (888) 336-6884.

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Pre-registration Required

Registration for this workshop is available at www.lifetimeparadigm.com/webinars or (800) 810-1736.

Workshop attendees earn up to one hour of CPE credit in Finance.

Additional Information:

Prerequisites: None

Who Should Attend?

- CPAs
- Attorneys
- Other professionals

Advanced Preparation: None necessary, although a basic understanding of the Social Security program is helpful.

Program level: Basic

Delivery method: Group-Virtual Workshop
Seating is limited. Reserve your space now by: (800) 810-1736 or www.lifetimeparadigm.com/webinars

