

Webcast Title: **Larry Stein's Essential Moves And Strategies For Retirement Wealth**

Recommended CPE Credit Hours: 8 CPE Credit Hours.

Highlights:

Come join Larry Stein as he discusses strategies and moves for your client's retirement wealth. Key tips and ideas will be presented including strategies for IRAs, qualified retirement plans, real estate, and more. Don't miss out on this high-yield CPE opportunity!

Learning Objectives:

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

1. Explain **selected** tax strategies for traditional IRAs and Roth IRAs.
2. Explain the required minimum distribution rules for IRAs and Qualified Plan Accounts.
3. Explain the 3.8% net investment income tax rules.
4. Explain **selected** Social Security and Medicare ideas.
5. Explain selected retirement planning strategies.

Major Topics:

- Traditional IRAs – Four Angles That You Much Know!
- Roth IRAs – Why You Must Focus Now!
- The New 3.8% Net Investment Income Tax Rules – Opportunities And Pitfalls.
- IRA And Retirement Plan Distributions – Maximize Wealth.
- Real Estate – Three Key Tax Strategies.
- Retirement Planning, Social Security, Medicare, Estate Planning, And Much Much More!
- The Impact Of The **Windsor** And The **Perry** U.S. Supreme Court Cases.

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 Webcast Lecture With Questions And Answers.

Recommended CPE Credit Hours: 8 CPE Credit Hours.

Advanced Preparation: Basic knowledge of federal taxation.

Texas Registration: 009838

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