

Webcast Title: Social Security – Tips, Insights, Strategies, And Traps

**Recommended
CPE Hours: 4 CPE Credit Hours.**

Highlights:

Come join Larry Stein as he discusses Social Security retirement benefits. Larry will focus on tips, ideas, moves, strategies, and insights for when to take Social Security benefits, how to estimate and calculate benefits, and spousal benefits. Eligibility and taxation of Social Security benefits will also be covered.

Learning Objectives:

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

1. Explain the eligibility criteria for Social Security retirement.
2. Explain spousal Social Security retirement benefits.
3. Explain how to calculate and estimate Social Security retirement benefits.
4. Explain the taxation of Social Security benefits.
5. Explain the factors in (“taking early”, “delaying collection”, “suspending”) when to take Social Security retirement benefits.

Major Topics:

- Social Security Eligibility.
- Social Security Benefits – Spouse And Family.
- Computation Of Social Security Benefits.
- Estimating Social Security Retirement Benefits.
- When To Take Social Security – Early Retirement, Full Retirement, Delayed Retirement Credits, And Key Factors!
- Taxation Of Social Security Benefits.

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

NASBA Fields Of Study: Management Advisory Services.

Level: Intermediate.

Presentation Method: Live Webcast Lecture With Questions And Answers.

Recommended CPE Credit Hours: 4 CPE credit hours.

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

Texas Registration: 009838

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