Jennings-TaxSpeaker Social Security Seminar

PENNSYLVANIA SOCIETY OF TAX & ACCOUNTING PROFESSIONALS
LEVERAGE THE POWER OF SMALLER PRACTICES℠

Discount Pricing Available! The Northeast & Lehigh Valley Chapters are offering a special $50 discount for those who register for this seminar AND also register for the Lehigh Valley Chapter's Jennings-TaxSpeaker Technology Seminar on September 25th (registration form enclosed) To take advantage of this special offer please call the Executive office at 1-800-270-3352.

Date: Tuesday, September 26, 2017

Time: 8:00 AM to 4:30 PM (Registration begins at 7:00 AM)

Sponsored By: Northeast Chapter & Lehigh Valley Chapter

Location: The Woodlands Inn, 1073 Highway 315, Wilkes Barre, PA 18702

CPE: 8 Credits Federal Tax—Also Qualifies for 7 Hours CLE Credits for Attorneys

Level: Intermediate PA Sponsor PX-000501L NJ: 20CE00159200 NY: 00228

PSTAP Member Price: $185 **Non-Member Price: $220**

Registration Fee includes Seminar Workbook, Continental Breakfast, & Lunch

- **REGISTER:** Online: www.pstapcpe.com Mail: PSTAP, Attn: Seminar Registrations, 20 Erford Road, Suite 200A, Lemoyne, PA 17043.
- Seminar Confirmations—Sent upon registration, via email only—please provide your email address below.
- Questions??? Contact PSTAP Executive Office at 1-800-270-3352 or by email at info@pstap.org
- Refund Policy: Cancellations received after **Sept. 17, 2017** will be refunded less $35 service fee.
- No Show—No Refund—No Exceptions
- **IMPORTANT:** You must sign attendance registers in and out to obtain full credit.
- CPE Regulations mandate that attendee must register, attend the full session, and sign out personally.
- Directions and Seminar Notices: see www.pstapcpe.com

Business Casual Attire is Appropriate

Registration Form: *(one form per registration—photocopy for additional registrants)* **Registration deadline: Sept. 17, 2017**

Please check one: Northeast Chapter _____ Lehigh Valley Chapter _____ Other: ___________________________

____ PSTAP ID #:_______________PTIN #:_______________
First Name *MI* *Last* *(see mailing label)* *(Required If applicable)*

Firm: ____Phone: ( ) _____________________________________

____
Street Address *City* *State* *Zip*

____ ____
Email Address *License Number—CPA/PA—Required*

Will you eat lunch with us? Yes ___ No ___

☐ **PSTAP Member $185** ☐ **NON-MEMBER $220**

Attorneys Please include additional $10.50 for CLE credit

Separate checks for each seminar please!

☐ Check Enclosed—Payable to PSTAP Lehigh Valley Chapter —Mailed to the above address

☐ VISA /MC/AMEX Acct #____ Exp:_________ CVV:_______

Signature:____

NE 0520017

Jennings-TaxSpeaker Social Security and Medicare Seminar Description:

The Social Security Administration tells us that 10,000 Americans will turn 65 today, tomorrow and every single day for the next 14 years. This is the single biggest demographic change in the history of our country, with the single biggest need for advice. As Americans approach retirement age, they do not know where to turn for unbiased advice. In this incredible course, we provide you with the knowledge, the software and the guides to offer this new phenomenally in-demand advice to your clients. Updated for the latest changes, the 2016 complete Social Security course has new chapters on adding a Social Security consulting practice (with marketing and engagement letters as well as software guides) and planning situations. We recommend this class to all professionals of all ages because of the long-term planning possibilities.

Upon completion of this course, you will be able to-Explain the basic structure of the system to clients and provide them with additional resources they can use to find out more information; Guide clients through the process of applying for Social Security benefits; Explain to clients when they will qualify for survivors' benefits; Explain the disability protections to clients as well as when they are eligible for benefits and how their benefit amount is determined; Inform clients about the various health insurance benefits for which they are eligible under Medicare; Walk clients through various scenarios of how adjusting their earnings will affect their benefits; Provide planning advice on when clients should begin to withdraw their benefits; Provide married couples with strategies to receive the maximum benefit.

Speaker Bio: Bob Jennings, CPA, EA Bob is a nationally renowned author and speaker, presenting continuing education classes to over 100,000 tax professionals over the last 20 years all over the world. Bob is a licensed CPA (Indiana), and an IRS Enrolled Agent. Bob is also a prolific author and has published over 60 professional articles in such magazines as the Journal of Accountancy as well as many other professional and consumer publications.

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