

## Practice Management/Social Security

### Central/South Central Joint Education Committee

#### Jennings-TaxSpeaker Practice Management/Social Security Seminar Monday, June 10, 2019

**Radisson Harrisburg**  
**1150 Camp Hill Bypass**  
**Camp Hill, PA 17011**  
**Hotel Phone: 717-763-7117**

For discounted overnight hotel accommodations at a rate of \$122 (taxes, etc. not included), please call 717-763-7117 and reserve by 5/10/19.

**Registration: 7:30 AM**  
**Start/End Time: 8:00 AM–4:30 PM**  
**Course Level: Basic**  
**CPE: 8 Hours Other**

**SPEAKER: Bob Jennings, CPA, EA, CFP**

PSTAP is an approved continuing professional education sponsor.  
PA #PX-000501L, NJ #20CE0015920, NY #002280, IRS CE #E3S5R

**For Jennings-TaxSpeaker Practice Management/Social Security Seminar Course Description see reverse side of this form.**

**PSTAP Members: \$225**

**Non Members: \$295**

- Registration fee includes seminar workbook, continental breakfast, lunch & refreshment breaks
- **REGISTER** Online: [www.pstapcpe.com](http://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](mailto:info@pstap.org)
- Refund Policy: Cancellations received by **June 4, 2019** will be refunded less a \$35 service fee, 50% refunded thereafter.
- No Show—No Refund—No Exceptions. Overnight Accommodations: Call the Radisson 717-763-7117.

Registration Form: (one form per registration—photocopy for additional registrants)

**REGISTRATION DEADLINE: 6/4/19**

First Name \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_ PSTAP ID #: \_\_\_\_\_ PTIN # \_\_\_\_\_

Firm: \_\_\_\_\_ Phone: ( ) \_\_\_\_\_

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email Address \_\_\_\_\_ License Number—CPA/PA—Required \_\_\_\_\_

Please indicate Rate

☐ PSTAP Member \$225

☐ Non Member \$295

☐ Check Enclosed—Payable to PSTAP Joint Education Committee —Mailed to the above address \*\*

☐ VISA/Amex Acct # \_\_\_\_\_ Exp: \_\_\_\_\_ CVV: \_\_\_\_\_

☐ MASTERCARD Acct # \_\_\_\_\_ Exp: \_\_\_\_\_ CVV: \_\_\_\_\_

Signature: \_\_\_\_\_

\*Please do not combine meeting & seminar fees on same check. JUNE10JEC Jennings Prac Manag/SS 1112019/All Topics Subject to Change IRS: E3S5R-

## Practice Management & Social Security Seminar Course Description:

**Practice Management:** One of the most challenging courses ever taken, we jump right in to changing the outmoded and old fashioned billing practices many firms use. With letters, real-life experiences from having sold 3 self-built CPA firms and bought over 20 smaller firms and practical guidance honed from dozens of mistakes we show you how to grow and operate a small firm efficiently and profitably while dealing with clients and employees. For 2018, this class includes the rarely available “Exit Strategies” course about how to buy, sell, and merge a firm and add a partner.

**Social Security:** Nearly ten years ago Bob Jennings CPA, CFP® wrote his first Social Security book, the Amazon best-selling “Guide to Social Security”. We began offering this class as a live course with Bob in 2013, and then also with Ron Roberson in 2016. The response from class participants has been incredible, and after presentations at the AICPA High Income Tax Conference, as well as at several national conventions, this course has become one of our most popular non-tax topics. In the class (and the accompanying 200-page manual) we discuss qualifying for benefits; benefits for divorcees, widows and widowers; dependent children; disabled children; planning to maximize benefits, and special issues such as windfall elimination and government pension offsets. We even show you how the benefit is calculated; how to sign up; and how to add Social Security consulting to your office. This course also includes a short review of Medicare. Updated to include the latest 2019 amounts, we guarantee the value of this class to you both personally and professionally.

### Course Objective:

Social Security: 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 client 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 client should begin to withdraw their benefits; Provide married couples with strategies to receive the maximum benefit.

### Speaker Bio:

Bob Jennings, CPA, EA, CFP 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; annually authors several tax, accounting and technology manuals; and is a regular columnist for FoxBusiness.com. As the founder of his own regional CPA firm in 1984, Bob has dealt exclusively with individual and small business financial issues for over 30 years. Bob appears regularly in the media and has been quoted extensively by numerous publications. He has recorded an extensive number of information videos, DVD’s and instructional clips available on his website at TaxSpeaker.com.

