ASSET PROTECTION 2020 (CE9 486 R1)
This interactive course will cover the new estate tax laws as well as long term care asset protection strategies. Learn the best ways to transfer assets to the next generations without completely relinquishing control. We will discuss family business succession planning, LLCs, LLPs, and various trust options to protect real estate and other assets from transfer taxes, long term care claims, divorces, and other liabilities.

ONE-DAY WORKSHOP.
Instructor: Ann Margaret Carrozza, Esq.
CE9 486 R1 Meets: November 18, 7:00pm-8:30pm.
Fee: $45

SAVVY IRA PLANNING (CE9 584 R1)
A lot of people have a plan for accumulating money for retirement, but far too often that's where the planning stops. The reality is that a sound distribution strategy—in other words, a plan for taking money out of your retirement accounts—is also extremely important. In this course you will learn some of the key IRA rules, how to avoid some of the biggest IRA mistakes, and some savvy planning strategies that can help you keep more money in your pockets by putting less in Uncle Sam's.

ONE-DAY WORKSHOP
Instructor: Jeffrey Levine
CE9 740 R1: Tuesday, October 6, 7:00pm-10:00pm.
Fee: $45

THE ABC’S AND D’S OF MEDICARE (CE9 586 R1)
Ready to retire? Understanding Medicare doesn't need to be your new full-time job. Medicare can be complicated; enrollment errors can be costly and may follow you for years. This informative session will educate you about the component parts of Medicare, including hospitalization, outpatient services and drug coverage. Learn about enrollment periods and how to transition from employer coverage to Medicare. Discover the differences between Original Medicare, Medicare Advantage, and Medicare Supplement plans. In addition, we will explore programs for people with limited income and resources.

ONE-DAY WORKSHOP.
Instructor: Wendy Weinstock
CE9 586 R1 Meets: Tuesday, October 13, 7:00pm-9:00pm.
Fee: $45

TEN STEPS TO LOWER TAXES IN RETIREMENT (CE9 585 R1)
Not food… not a mortgage… not even the cost of health care… but taxes! For many people, taxes will be the single biggest expense in retirement. Unfortunately, navigating the tax code can be tricky—they don't call it the "code" for nothing, after all—but by utilizing the right techniques and strategies, there’s a good chance that you can meaningfully lower your tax expense in retirement. In this course you will learn about 10 powerful strategies that can help you reduce your tax bill so that you can enjoy more of your hard-earned money doing the things you enjoy the most with the people who matter most.

ONE-DAY WORKSHOP
Instructor: Jeffrey Levine
CE9 740 R1: Tuesday, October 6, 7:00pm-10:00pm.
Fee: $45

CHOOSE YOUR RETIREMENT LIFESTYLE (CE9 716 R1)
Are you trying to figure out what you are going to do when you retire? Did you retire and still don’t know what you want to do? In this workshop, we will explore your natural abilities, workplace skills and explore what possibilities exist for you in choosing your retirement lifestyle. This workshop is a great opportunity to help you write your next great life chapter and secure a fulfilling life in retirement.

ONE-DAY WORKSHOP.
Instructor: Thomas Marino
CE9 716 R1: Wednesday, October 14, 6:30pm-8:30pm.
Fee: $45

MAXIMIZING SOCIAL SECURITY (CE9 550 R1)
With historic changes in Social Security signed into law, prepare for your retirement and learn how to get the most out of your social security benefits. Learn to manage longevity risk and strategies to maximize the amount of money you receive throughout retirement. Among the topics included are spousal benefits, the impact of divorce, death, delaying benefits, early retirement, and taxation. You’ll receive Myths and Facts about Social Security: What Should You Do at Age 62.

ONE-DAY WORKSHOP.
Instructor: John Brenkovich, CFP
CE9 738 R1: Monday, November 16, 6:30pm-9:00pm.
Fee: $45

ELDERCARE MEDICAL COSTS (CE9 653 R1)
This course will discuss strategies and the importance of planning ahead to protect hard earned assets in the face of rising non-insured, nursing home, assisted living and personal medical eldercare costs.

ONE-DAY WORKSHOP
Instructor: Richard Jack
CE9 739 R1: Tuesday, October 6, 7:00pm-9:00pm.
Fee: $45