

# **SOCIAL SECURITY & MEDICARE**

## **Product Description**

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. You will be able to guide clients through the process of applying for Social Security benefits and inform them about the various health insurance benefits they are eligible for under Medicare. Participants will be able to provide married couples with strategies to receive the maximum benefit as well as planning advice on when clients should begin to withdraw their benefits. You will be able to explain divorce issues to clients, as well as when they are eligible for benefits, how their benefit amount is determined, and when they will qualify for survivors benefits. You will be able to walk clients through various scenarios of how adjusting their earnings will affect their benefits. In addition, you will be able to inform clients of any changes to social security in 2022, including terminology, when and how to sign up, dependent's benefits and survivor benefits. You will obtain a general knowledge of the reduction, tax ability, categories, and qualifications of benefits. The course will give you the ability to calculate benefits, as well as understand the effects of divorce or death on social security benefits.

## **Prerequisites**

None

## **Field of Study**

Taxes - 8 Hours

## **Course Level**

Intermediate

## **Course Objectives**

This course is the answer to any Social Security questions. Beginning with an overview of facts, tax ability and benefits, the instructor then examines the individual rules to calculate benefits, when to draw, how to qualify and the tax inter-related aspects of these decisions. Will then specifically and carefully discuss survivor and divorce benefits, children and other dependents, and disability. Conclude with an in-depth and up-to-date explanation of Medicare. In prior years, this course was sold to the general public as an Amazon best-seller on Social Security.

## **Available Options**



### **Webinar**

A scheduled, online course viewable on any computer or device with Zoom access; suitable for single person use. Webinar include: online course, eBook download, & PDF of PowerPoint slides. CPE credit will be issued based on login time and percentage of polling questions answered.

### **Date**

June 6, 2023 - 8 am to 4 pm (Central Time)

### **Price**

\$300.00

Late Registration - additional \$50.00 one week prior WEBinar

### **Disclaimer**

WEBinar begins promptly at the stated time.

Cancellation, Transfer and Refund Policy For Individual WEBinar Purchase.

Registration fees will be refunded in full with no cancellation fee 30+ days prior to the event.

Registration fees will be refunded in full 8 to 30 days prior to the event minus a \$50.00 cancellation fee.

**NO REFUNDS/TRANSFERS WILL BE ISSUED UP TO 7 DAYS PRIOR TO THE EVENT AND/OR THE EVENT START – NO EXCEPTIONS.**

At the discretion of the presenters, ASTP Board of Directors, or venue, this event can be cancelled, changed to webinar format, or rescheduled to another date/format due to Covid protocols and recommendations.

For more information regarding administrative policies, complaints and refunds please contact us at 605-351-2390 or visit [www.astxp.com](http://www.astxp.com).

The American Society of Tax Professionals has entered into an agreement with the Return Preparer Office, Internal Revenue Service, to meet the requirements of 31 Code of Federal Regulations, section 10.6(g), covering maintenance of attendance records, retention of program outlines, qualifications of instructors, and length of class hours. This agreement does not constitute an endorsement by the Return Preparer office as to the quality of the program or its contribution to the professional competence of the enrolled individual. IRS Sponsor Number T0BDV.

ALL OF OUR TAX COURSES HAVE IRS APPROVAL UNLESS OTHERWISE NOTED\*\*