Estate and Financial Planning for the Older Client

The range of elder planning problems is vast. This course takes a fresh look at the problems the practitioner may encounter in estate and financial planning for older clients and carrying out those plans.

OBJECTIVE:

At the end of this course you will be able to:

- List specific planning needs for the older client.

HIGHLIGHTS:

- Understanding Medicare
- Types of life insurance and the issues specific to the insured elder
- Overview of Medigap insurance
- Understanding Social Security issues
- Medicaid planning and its implications with trusts, insurance, and annuities
- Planning tips using Roth and other IRAs
- Special estate planning issues for the older client
- Housing and care alternatives
- Specific estate planning issues for the older client
- Gifting issues for the older client

DESIGNED FOR: CPAs, EAs, attorneys, financial planners, insurance agents, and bankers

RECOMMENDED CPE: 8 credit hours

PREREQUISITE: None

EVENT ACRONYM: OLDX

LEVEL: Basic

FIELD OF STUDY: Taxes