

Minnesota Association of Public Accountants Social Security & Medicare

August 28, 2024

8am – 4pm

Webinar

Course Information: 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, taxability, 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.

Course Objective: This course is the answer for any and all Social Security questions. Beginning with an overview of facts, taxability 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. We then specifically and carefully discuss survivor and divorce benefits, children and other dependents, and disability. We then conclude with an in-depth and up-to-date explanation of Medicare.

Date	August 28, 2024	Credits	8
Time	8am – 4pm	IRS Program No:	Pending
Location	Webinar	Field of Study	Taxes
Speakers	TaxSpeaker	Prerequisites	None
Early Registration	August 21, 2024	Course Level	Intermediate
Member Fees:	Early - \$300 After 8/21/2024 - \$325	Non-Member Fees:	Early - \$360 After 8/21/2024 - \$385

Attendee Information:

Attendee Name:	Circle One: CPA EA RAP Other (please specify)
Firm Name:	PTIN:
Mailing Address:	
City:	State: Zip:
Email:	Daytime Phone:

Payment Information:

Payment must accompany registration. Registration fee is based upon the date payment is postmarked or received, or the date of online payment. If paying by credit card, all fields are required. Registration is valid for only one attendee. If more than one attendee is participating in a webinar, they must be registered separately.

Enclosed is \$ _____ in payment of this seminar payable to "MAPA"	
Please Charge (circle one): Visa MasterCard AMX Discover	
Card #:	Security Code: Exp Date:
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Billing Address (if different from above)	
City	State: Zip:
Cardholder Signature:	

Please note that the MAPA office cannot accept card payment information transmitted by email due to PCI Compliance standards. Cancellation: The registration fee less a \$30 administrative charge can be refunded up to 10 business days before the seminar. An 80% refund can be obtained with written notice of cancellation between 5 and 10 business days prior to the program. No refund for cancellation less than 5 workdays prior, or for no-shows. Space cannot be guaranteed for walk-in or day-of registrations. Registrations are transferable one time only to another offering except as noted.

Please register early. Mail with Payment to: PO Box 301, Big Lake, MN 55309 • Fax: 763-263-8020 • Phone: 612-366-1983