



Are you ready for the Retirement Boom?

There are 79 million baby boomers who are on the verge of retirement. For the next twenty years, an average of 10,000 people each day will reach age 65, which has historically been the retirement phase of life.

Between 2000 and 2010, the number of people age 65 to 84 in the U.S. grew by 3.3 million. While 13 percent of Americans are currently age 65 or older, that proportion will jump to 18 percent by 2030. The current 40 million senior citizens will balloon to 89 million by 2050. These numbers and their impact are awe-inspiring and a bit frightening. Prepare to advise these clients by attending this timely seminar, register today!

Topics to be covered in this seminar include:

Income Tax & Retirement Planning for the Elderly

- Retirement Plan – Designing & Determining What is Best
- Medical & Long Term Care Planning Strategies
- Planning with the Home
- Informational Return Issues
- Decedent's Final Tax Return
- Avoiding Income Tax of Social Security

Social Security Issues

- When to Take Benefits - At Age 62 or Later?
- How to Maximize Your Benefits Under the Senior Citizens Freedom to Work Act of 2000
- How Benefits are Determined
- Taxation of Benefits
- Determining Insured Status
- Many Examples & Questions Answered

Medicare Issues

- What's New
- Understanding the Four Parts (A, B, C and D) Eligibility & Enrollment
- What Medicare Covers
- Choosing the Right Drug Plan
- Many Worksheets & Questions Answered

Reverse Mortgages

- They Are Here & Here to Stay!
- Should You or Should You Not?
- Other Alternatives

Medigap Insurance

- What is the Medigap?
- Ten Plans - Which to Choose?

Long-term Care Insurance

- Evaluating Policies & Smart Decisions

Medicaid Issues

- For those that Live Long enough, it is Not a Question of if they Will Need Medicaid, But When?
- Spend-Down vs. Income-Cap States
- Resource & Income Qualifications
- Transferring Assets to Qualify for Medicaid

NCSA FALL PAS

SERVING A MATURING NATION- LEVEL I

WHAT 79 MILLION BABY BOOMERS NEED TO
KNOW

SEPTEMBER 25 & 26, 2014

EMBASSY SUITES RALEIGH/DURHAM
CARY, NORTH CAROLINA

Early Bird Registration
ends August 20

\$299 NCSA Members

\$349 Non-Members

Add \$50 after 8/20

Register online at

www.ncsa1947.org

Or fax/mail the attached
registration form



201 Harrison Oaks Blvd.
Cary, NC 27513
(919) 677-1840
NCSA Group Code: SOA

Just minutes from Research Triangle Park (RTP) and Raleigh Durham International Airport in Cary, North Carolina, the Embassy Suites Raleigh-Durham/Research Triangle hotel is perfectly situated for business guests. Raleigh attractions are also close by. Catch a Carolina Hurricanes game at the PNC Center or indulge in a unique shopping experience at Cameron Village. Guests at this hotel in Cary, NC can select either king or two bedded, two-room suites. Suites offer the space and freedom of separate bedroom and living rooms, with wireless high-speed internet access and other premier amenities. Relax with your favorite movie on the 37-inch flat-screen HDTV, or enjoy in-suite cooking with your own refrigerator and microwave oven.

**NORTH CAROLINA SOCIETY OF ACCOUNTANTS, INC.
2014 FALL PROFESSIONAL ACCOUNTING SEMINAR**

SERVING A MATURING NATION-LEVEL I

What 79 Million Baby Boomers Need to Know

As a practitioner are you prepared to help aging clients?

This seminar will examine strategies for clients entering their retirement years and for those who have been retired already. Issues to be covered include Income Tax & Retirement Planning, Social Security Issues, Reverse Mortgages, Long Term Care, Medicare/Medicaid/Medigap, Information Return Issues and the Decedents Final Tax Return. This seminar should allow the attendee to become a trusted resource to Baby Boomer clients seeking advice about their retirement years.



SEPTEMBER 25 & 26, 2014
EMBASSY SUITES RALEIGH/DURHAM
CARY, NORTH CAROLINA

NORTH CAROLINA SOCIETY OF ACCOUNTANTS, INC

PO BOX 1126

CONOVER, NC 28613

1-866-755-NCSA (6272)

(828) 695-2522 fax



**NCSA FALL PROFESSIONAL ACCOUNTING SEMINAR
SERVING A MATURING NATION-LEVEL 1
WHAT 79 MILLION BABY BOOMERS NEED TO KNOW
SEPTEMBER 25 & 26, 2014**

*The North Carolina Society of Accountants will present its
Fall Professional Accounting Seminar (PAS) at the
Embassy Suites Raleigh/Durham-Research Triangle,
201 Harrison Oaks Blvd. Cary, North Carolina 27513.*

COURSE LEVEL: INTERMEDIATE	METHOD: LECTURE & DISCUSSION
PREREQUISITE: NONE	ADVANCE PREPARATION: NONE
FIELD OF STUDY: FEDERAL TAX MATTERS	IRS PROGRAM NUMBER: A8FPT-T-00028-14-I

“Serving a Maturing Nation-Level I: What 79 Million Baby Boomers Need to Know”

Course Description and Topics: This course will enable you to begin assisting your clients with Retirement, Social Security and Medicare planning. This is timely information because our nation now has 79 million baby boomers who are seeking advice on the following topics:

- ◆ Social Security Issues
- ◆ Medigap Insurance
- ◆ Medicare Issues
- ◆ Long-term Care Insurance
- ◆ Reverse Mortgages
- ◆ Medicaid Issues
- ◆ Income Tax & Retirement Planning for the Elderly

NCPE also offers Level II and Level III seminars that can lead to additional credentials, contact NCPE for additional information at www.ncpeseminars.com or 1-800-682-2163.

Thursday and Friday, September 25 and 26, 2014 (8:00am - 4:30 pm both days)

About our seminar presenters:

Jerry Riles, EA, CSA, ABA, ECS – 8 CPE Hours

An experienced tax and accounting practitioner specializing in small business and individual taxation, Jerry has been self-employed since 1963. Enrolled to practice before the IRS, he has been an income tax lecturer since 1979. Jerry holds a B.S. degree in Accounting, and was named NAEA’s Speaker of the Year for 1997. He is an active member of both the NSA and the NAEA.

Wayne Hebert, CPA – 8 CPE Hours

Wayne has been a tax and accounting practitioner for 29 years with Wayne Hebert, CPA and Associates in New Orleans, Louisiana. He has 27 years experience as an income tax lecturer. He is the president of the National Center for Professional Education, Inc. Wayne holds a B.S. in accounting and an M.S. in taxation. Wayne has served as president and in various other positions for the Louisiana Society of Independent Accountants, an affiliated state organization of the National Society of Accountants (NSA). He is a member of the AICPA and the NSA, and is an Associate member of the NAEA.



**APPROVED
CONTINUING EDUCATION
PROVIDER**

**North Carolina Society of Accountants, Inc.
is an Internal Revenue Service Approved
Continuing Education Provider.
Provider #A8FPT
for Enrolled Agents and Other Tax Return Preparers.**

REGISTRATION

Registration includes breaks only. Lunch is on your own, the hotel has dining options and many restaurants are nearby and within walking distance.



Please complete and return this form to the NCSA office:

NCSA, Post Office Box 1126, Conover, NC 28613

Phone: 866-755-6272 Fax: 828-695-2522

	Before August 20th	After August 20th
Member	\$299.00	\$349.00
Non-Member	\$349.00	\$399.00

Embassy Suites Raleigh/Durham-Research Triangle has a limited number of sleeping rooms at a reduced rate of \$129 per night. Rooms must be reserved by August 25, 2014, to obtain discounted rate. Please make your reservations directly with the hotel. Call (919) 677-1840 for reservations and tell them you are with the North Carolina Society of Accountants Group Code SOA.

Name

Address

City, State, Zip

Telephone

Credit Card Number

Exp. Date

Billing Address for Card

Signature

METHOD OF PAYMENT:

Check (Make payable to NCSA)

Visa

MasterCard

Discover

Three Digit Security Code on Back of Credit Card needed for Processing Credit Card Transactions

Cancellation Policy

You can reach the NCSA Executive Director toll free at 1-866-755-6272, 24 hours a day to leave a message to cancel your registration for this seminar. There is no fee for cancellations received prior to August 25, 2014, a \$50 administrative fee for cancellations received between August 26 and September 10, 2014, and complete forfeit of registration fees and material for cancellations received after September 11, 2014. No shows will forfeit their entire registration fee and materials. Please call and cancel your registration before the event date to not be considered a No Show.