



SOCIAL SECURITY, MEDICARE AND MEDICAID: WHAT YOU NEED TO KNOW

Why YOU Should Purchase

This 3.3-hour January 15, 2014 program by Steven G. Siegel should be of interest to every attorney advising clients, parents (and even him/herself) on these important topics.

In this practical and thorough explanation, you will be guided through the Social Security, Medicare and Medicaid mazes – including the effects of the Affordable Care Act (“Obamacare”) – and receive many useful planning tips. This comprehensive program is an important update to the course Mr. Siegel presented in 2010.

This detailed “**how-to**” practitioner-oriented program gives you the *knowledge you need* to properly advise your clients.

COMPLETE TABLE OF CONTENTS

To see the complete **Table of Contents** for this course book, or that of any other Estates, Gifts, Trusts or Tax topic we offer, go to www.nlfcle.com and click on the **Estates, Gifts, Trusts & Tax Materials** link on the home page. Click on the blue **Table of Contents** link under the title of the topic you wish to review. To return to the **Estate, Gifts, Trusts and Tax Materials** main page, click the “Back” key on your browser.

STEVEN G. SIEGEL is president of The Siegel Group, Morristown, New Jersey, a national consulting firm providing tax and estate planning advice to individuals and businesses. Mr. Siegel holds a BS from Georgetown University, a JD from Harvard Law School and an LLM in Taxation from New York University. He is the author of many books and a nationally-recognized writer and speaker who has lectured extensively throughout the United States on tax, business and estate planning topics.

TOPICS

✓ **Baby Boomers And Social Security**

- application
- credits
- benefits including taxation
- planning issues and suggestions



✓ **Medicare – The National Health Insurance Program**

- the parts of Medicare
- eligibility and enrollment
- benefits under Parts A, B, C and D
- Medicare supplemental insurance

✓ **Medicaid – Government Provided Health Care Assistance**

- how Medicaid works
- coverage and eligibility
- qualification: resources testing, exempt assets, community spouse
- transfer of assets to achieve eligibility
- additional strategies to achieve qualification

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3.3-Hour Audio CDs/DVDs: These recordings of the entire program can be used at home or office. Audio CDs are **great for studying while traveling**. The DVDs are in color and **perfect for group or individual viewing**. Each includes a GBC-bound book.

Recordings of Live Program: The audio CDs and DVDs are the unedited recordings of the full 3.3-hour presentation by Mr. Siegel on **January 15, 2014**.

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Valuable Book!

At least purchase the outstanding, comprehensive course book Mr. Siegel has prepared:

✓ **60 Pages**

✓ **Major Headings Are:**

- **Baby Boomers And Social Security**
 - Application
 - Credits Needed For Coverage
 - Did the Client Accumulate Social Security Credits at the Maximum Rate?
 - Social Security Retirement Benefits Available for Workers
 - Benefits for Spouses
 - Benefit Reduction for Early Retirement
 - Extra Benefits for Delayed Retirement
 - How Are Social Security Benefits Taxed?
 - Much more
- **Medicare – The National Health Insurance Program**
 - Overview – The Parts of Medicare
 - Eligibility
 - Enrollment
 - Benefits Available
 - Much more
- **Medicaid – Government Provided Health Care Assistance**
 - Overview
 - Medicaid Coverage
 - Medicaid Eligibility
 - Medicaid Qualification
 - Transfers of Assets to Achieve Medicaid Eligibility
 - More



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SOCIAL SECURITY, MEDICARE AND MEDICAID

• **January 15, 2014** • **3.3 Hours** •

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