



Retirement Income Strategies

PLACE:

DATE:

TIME:

Schedule of Additional Offerings

1. Social Security Planning:
What CPAs' Need to Know About
Claiming Strategies
2. Business Succession Planning-
Formalizing the Transfer of Ownership
3. Charitable Giving - Philanthropic
Planning Tools
4. Social Security Claiming Strategies
5. Asset Protection Planning
6. Selective Executive Compensation
Strategies
7. Consulting Services that Clients Want
From CPAs
8. Planning Chronic Illness & Long Term
Care Expenses
9. Business Valuation
10. Selective and Discriminatory
Executive Retirement Strategies
(SERP)

Learning Objectives

Comparison of methods available, and viability of each, for individuals to generate income during retirement from liquid assets; both ERISA Qualified and Non-Qualified funds. The impact of the Monte Carlo Principle effect and how to coordinate different strategies to mitigate that effect.

LIVE INSTRUCTION

Prerequisites: None

Program Level: Basic though Advanced

Advanced Preparation: None

SEATING IS LIMITED

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We have registered with the Texas State Board of Public Accountancy as a CPE Sponsor.
This registration does not constitute an endorsement by the Board as to the quality of our CPE program.

Protect Assets, Grow Wealth, Live Well



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