



Selective and Discriminatory Executive Retirement Strategies (SERP)

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. Retirement Income Strategies
10. Business Valuation

Learning Objectives

Review traditional and innovation SERP strategies; tax ramifications to employer and employees, employers responsibility and liability in approach.

Pro and cons to owners in utilizing these methods for an orderly transfer of management and value protection.

LIVE INSTRUCTION

Prerequisites: None

Program Level: Basic though Advanced

Advanced Preparation: None

SEATING IS LIMITED

RSVP to: Ray Croff
croff@raycroff.com
940-391-5336

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



Ray Croff, CLU, ChFC, RFC, CAP
Registered Financial Consultant • Managing Partner
Cell Direct: 940.391.5336 • croff@turtlecreekfinancial.com

