



## Syllabus for Continuing Education Program

Program Provider: Society of Financial Service Professionals Twin Cities  
(MN Dept. of Commerce Provider #8724)  
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**Program Title:** **The Ten Most-asked Social Security Questions**

**Speaker:** Jim Czechowicz  
Public Affairs Specialist  
U.S. Social Security Administration  
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Date: Thursday, June 1, 2017  
Time: 11:00 AM Sign-in/Networking  
11:15 AM Lunch Buffet Open  
11:30 AM Chapter Business  
12:00 PM – 1:30 PM Presentation

**Location:** **Midland Hills Country Club**  
2001 Fulham Street  
Roseville, MN 55113

**CE Credits:** This educational offering is **APPROVED** by the Minnesota Commissioner of Commerce as satisfying 1.5 hours of general classroom credit toward standard continuing insurance education requirements.  
CFP: 1.5 hours **APPROVED** standard credits  
CLE: 1.5 hours **APPROVED** standard credits  
A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.

**Who Should Attend:** Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs

**Educational Level:** Intermediate

### **Course Description**

This presentation will include how Social Security benefits are computed, who can receive Social Security, filing of a benefit application, when to sign up for Medicare, what are the wage limits in retirement without losing benefits, the history and future of Social Security, at what age to take benefits, and what you can do online at [www.socialsecurity.gov](http://www.socialsecurity.gov)

### **Learning Objectives**

- Will there be any Social Security?
- How are my benefits calculated?
- At what age should I start receiving my Social Security?
- How much may I earn after retirement?
- To what benefits is my spouse entitled?
- Are there still 'filling strategies' for couples?
- When and how do I sign - up for Medicare A? B? D?

### **Outline:**

I.	Social Security	10 minutes
a)	Past, Present, Future	
II.	Qualifying for benefits from Social Security	
a)	Qualifying for Social Security	10 minutes
b)	How are benefit amounts computed?	10 minutes
c)	When to start benefits	10 minutes
d)	Working and receiving benefits	10 minutes
e)	Spouses, windows, and children	10 minutes
III.	Disability, SSI, GPO, WEP, Online services	
IV.	Present Medicare & Extra Help	10 minutes
a)	Definitions/Qualifying	10 minutes
b)	When to enroll and in which part	
V.	Q&A	

Total time: 90 Minutes

### **Instructional Materials for Students:**

- Pamphlets and fact sheets at the session

### **Examination & Answers:**

- No exam