NJSEA Dinner and Educational Seminar

Wednesday, October 16th, 2019
5:45 p.m. - 6:30 p.m. - Buffet Dinner
6:30 p.m. - 9:00 p.m. - Educational Event

Early Bird pricing until Friday, October 11th

REGISTER NOW

Dear David,

Join us for our information-packed dinner meeting and educational event.

TOPIC: Medicare and Social Security Issues for Tax Professionals
DESCRIPTION: Learn how to help guide your clients through tax and financial implications of when and how to choose among medicare and social security benefit alternatives.

Learning Objectives:

- Medicare
  - Medicare Basics - Parts A, B, C & D
  - Who is Eligible for Medicare
  - Original & Medicare Advantage (Part C)
  - Medigap/Supplement Plans
  - When to enroll
  - Prescription Drug Plan Basics
  - Differences Between Medicare, Medicare Advantage and Medigap Plans - How to determine best options for clients
  - Medicare Tax-Specific Issues
- Social Security
  - Important Ages
  - Retirement Benefits
    - Spouse and Survivor Benefits
    - Divorcee Benefits

- Government, Military and Railroad Employees not covered by Social Security
- Disability Benefits
- Family Benefits
- Deferred and Executive Compensation
- Calculating taxable Social Security Income

- Our Featured Instructors: John Mossa, EA, CFP & Edward J. Ryan, Jr., EA

John Mossa, EA, CFP
John began his career in the early 1980's as an Institutional Bond Salesman working for several investment firms including: Alex Brown & Sons, Paine Webber and George K. Baum. As a municipal bond specialist, his client base consisted of banks, insurance companies and other professional money managers.
In 2001 he had a deep-seated desire to apply his expertise in the institutional markets to the retail investor. He joined a life insurance agency and in 2006 he received his CFP® designation. In 2015 the strong belief of the unique value offered by an independent financial advisor lured John to independence.
Central to John's career as a financial advisor is not only to provide clients with advice with the goal that they accumulate wealth, but also to build safe and secure income distribution strategies as they transition to retirement. In 2015 he enhanced his 30-year career in the financial industry by obtaining the ENROLLED AGENT designation.
He encourages clients and others who seek an informed opinion on Asset Allocation, Risk Management, Retirement Income, Medicare, Social Security and Tax strategies to take advantage of his "Sounding Board Process".
John grew up in Holmdel where he attended St. John Vianney High School; he obtained his B.S. Degree in both Business Administration and Marketing from King's College. He currently resides in Red Bank is an active member of The Jersey Shore Running Club and The Amerigo American Vespucci Society.

Edward J. Ryan, Jr., EA
Ed Ryan began his career at the property and casualty insurance company of Investors Insurance Group in 1979. He achieved the position of Vice President/Controller responsible for managing all of the company's accounting operations. During that time he was an integral part of several private placements, the purchase and sale of related business entities, as well as the eventual sale of IIG. After the sale of IIG, Ed established his own tax and accounting practice. In 1992, it evolved into Ryan Financial providing Family Wealth Management (Through Avantax Wealth Management) and Tax Services to over 700 individuals and over 100 small businesses. There are three convenient office locations in Rutherford and Union, NJ and Middletown, NY. Ed has been an HD Vest Chapter Director since

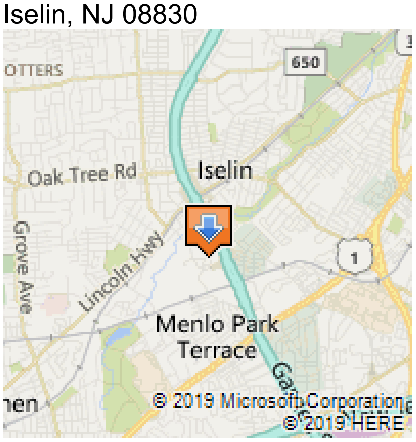
2001. In 2004, he became a Field Trainer for the HD Vest Financial Planning Institute (FPI). In 2005, HD Vest appointed Ed a mentor to train advisors who are new to financial planning. Since 2010, Ed has been recognized as a top 75 advisor at HD Vest. He is a Registered Investment Advisor, and holds series 6, 7, 52, 62, 63 and 65 licenses as well as life, health, property and casualty and variable insurance licenses. Ed became an Enrolled Agent in 1996 and has been active in the NJSEA since 2012. He has served as a guest speaker and panelist on multiple occasions since 2013. Ed has held the following positions at the NJSEA: * Education committee July 2013 - June 2017 * Bylaws Chairperson July 2014 - June 2015 * Director July 2012 - June 2015 * Treasurer July 2015 - June 2018 * President July 2018 - June 2020 Ed resides in Rutherford, NJ along with his wife, Lisa. They are the proud parents of four grown children. Ed is very active in his community currently serving as Trustee of the William Carlos William Center, a non-profit corporation of the Arts. He is also a member of the St. Mary Parish Finance Committee and St. Mary High School Alumni Board. Ed has also been a Trustee and Treasurer of the Rutherford Public Library from 1996 to 2008.

CE Credits: 3 IRS CE, 3 CFP CE, 3 CPA CE

IRS APPROVED CONTINUING EDUCATION PROVIDER

Where

APA Hotel Woodbridge (NEW LOCATION!)
120 Wood Avenue South
Iselin, NJ 08830



[Driving Directions]

Registration Fee

NJSEA & NAEA members $55/$65 after Friday, October 11th
Non-members and guests $75/$85 after Friday, October 11th

Includes buffet dinner. For special dietary needs, please contact Jenny Breedy (secretary@njsea.org); (732) 448-0753

Early Bird Pricing until Friday, October 11th

For More Information

Contact:
Jenny Breedy, Secretary
New Jersey Society of Enrolled Agents
(732) 448-0753
secretary@njsea.org

CLICK HERE TO REGISTER

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www.njsea.org