RETIREMENT PLANNING

ASSET PROTECTION 2020 (CE9 486 B1)
This interactive course will cover the new estate tax laws as well as long term care asset protection strategies. Learn the best ways to transfer assets to the next generations without completely relinquishing control. We will discuss family business succession planning, LLCs, ULPs, and various trust options to protect real estate and other assets from transfer taxes, long term care claims, divorces, and other liabilities.

ONE-DAY WORKSHOP.
Instructor: Ann Margaret Carrozza, Esq.
CE9 486 B1 Meets: Wednesday, March 11, 7:00pm-8:30pm.
Fee: $45

UNDERSTANDING OUR HEALTHCARE SYSTEM (CE9 707 B1)
To gain a better understanding of the seemingly complicated Affordable Healthcare Act, and where you are in the big picture and how it may affect you, attend this informative workshop. Learn how decisions are made and who makes them in America's traditional model of healthcare.

Instructor: Tiana Arroyo
CE9 707 B1 Meets: Wednesday, 6:30pm-8:30pm for 2 sessions.
Starts March 11
Fee: $80

HOW TO SELECT THE RIGHT FINANCIAL ADVISOR (CE9 619 B1)
If you are like most people, you may be cautious about whom to trust and may be unsure exactly how to go about finding and selecting the right advisor. This seminar is intended for audiences in all life stages and financial situations with specific examples for different circumstances. This seminar will help you prepare by providing a blueprint for how to select a “trustworthy” advisor right for you. Learn the six CRITICAL concerns you should consider before working with a financial advisor, as well as four key questions to ask yourself that will give you the foundation to select the right advisor.

ONE-DAY WORKSHOP.
Instructor: Richard Jack
CE9 619 B1 Meets: Tuesday, April 14, 7:00pm-9:00pm.
Fee: $45

BACK TO INVESTMENT BASICS (CE9 633 B1)
It is all too common nowadays for investment brokers and “investment advisors” to position their clients’ investment money in mutual funds, ETFs or other vehicles that are aggregated together with a multitude of other investors. For the most part, advisors and investment brokers have been utilizing funds or similar vehicles rather than choosing individual securities as a growing trend for decades. Learn the “basics” on how to oversee the management of your portfolio.

ONE-DAY WORKSHOP.
Instructor: Richard Jack
CE9 633 B1 Meets: Tuesday, April 21, 7:00pm-9:00pm.
Fee: $45

MAXIMIZING SOCIAL SECURITY (CE9 550 B1)
With historic changes in Social Security signed into law, prepare for your retirement and learn how to get the most out of your social security benefits. Learn to manage longevity risk and strategies to maximize the amount of money you receive throughout retirement. Among the topics included are spousal benefits, the impact of divorce, death, delaying benefits, early retirement, and taxation. You’ll receive Myths and Facts about Social Security: What Should You Do at Age 62.

ONE-DAY WORKSHOP.
Instructor: John Brenkovich, CFP
CE9 550 B1 Meets: Monday, March 9, 6:30pm-9:00pm.
Fee: $45

ELDERCARE MEDICAL COSTS (CE9 653 B1)
This course will discuss strategies and the importance of planning ahead to protect hard earned assets in the face of rising non-insured, nursing home, assisted living and personal medical eldercare costs.

ONE-DAY WORKSHOP.
Instructor: Richard Jack
CE9 653 B1 Meets: Tuesday, April 28, 7:00pm-9:00pm.
Fee: $45

TEN STEPS TO LOWER TAXES IN RETIREMENT (CE9 585 B1)
Not food… not a mortgage…not even the cost of health care…but taxes! For many people, taxes will be the single biggest expense in retirement. Unfortunately, navigating the tax code can be tricky – they don’t call it the “code” for nothing, after all! But by utilizing the right techniques and strategies, there’s a good chance that you can meaningfully lower your tax expense in retirement.

In this course you will learn about 10 powerful strategies that can help you reduce your tax bill so that you can enjoy more of your hard-earned money doing the things you enjoy the most with the people who matter most.

ONE-DAY WORKSHOP.
Instructor: Jeffrey Levine
CE9 585 B1 Meets: Tuesday, March 10, 7:00pm-10:00pm.
Fee: $45

SAVVY IRA PLANNING (CE9 584 B1)
A lot of people have a plan for accumulating money for retirement, but far too often that’s where the planning stops. The reality is that a sound distribution strategy - in other words, a plan for taking money out of your retirement accounts - is also extremely important. In this course you will learn some of the key IRA rules, how to avoid some of the biggest IRA mistakes, and some savvy planning strategies that can help you keep more money in your pockets by putting less in Uncle Sam’s.

ONE-DAY WORKSHOP.
Instructor: Jeffrey Levine
CE9 584 B1 Meets: Tuesday, March 3, 7:00pm-10:00pm.
Fee: $45

PLANNING FOR INCAPACITY AND END OF LIFE (CE9 648 B1)
Discussing the various documents that are used when someone is no longer able to or just needs help to manage his/her affairs. Includes an overview of the legal process in the event of incapacity and upon death.

ONE-DAY WORKSHOP.
Instructor: Staff
CE9 648 B1 Meets: Saturday, March 21, 10:00am-12:00pm.
Fee: $45

THE ABC’S AND D’S OF MEDICARE (CE9 586 B1)
Ready to retire? Understanding Medicare doesn’t need to be your new full-time job. Medicare can be complicated; enrollment errors can be costly and may follow you for years. This informative session will educate you about the component parts of Medicare, including hospitalization, outpatient services and drug coverage. Learn about enrollment periods and how to transition from employer coverage to Medicare. Discover the differences between Original Medicare, Medicare Advantage and Medicare Supplement plans.
In addition, we will explore programs for people with limited income and resources.

ONE-DAY WORKSHOP.
Instructor: Wendy Weinstock
CE9 586 B1 Meets: Tuesday, April 14, 7:00pm-9:00pm.
Fee: $45

10 WAYS TO LOWER YOUR INVESTMENT RISK (CE9 604 B1)
With memories of the Financial Crisis of 2007-2008 still fresh in their mind, many retirees and other investors are seeking ways of protecting their nest egg from the next major market downturn. Thankfully, by incorporating a variety of strategies into their planning, savers can significantly minimize exposure to a variety of potentially damaging risks. In this course, you will learn 10 key concepts used by professional investors, money managers and other financial professionals to reduce risk. The course is appropriate for investors of all ages and of varying levels of risk. Take away knowledge that is actionable, easy to implement, and relevant in today’s market landscape.

ONE-DAY WORKSHOP.
Instructor: Jeffrey Levine
CE9 604 B1 Meets: Tuesday, April 21, 7:00pm-9:00pm.
Fee: $45

PROBATE AND HOW TO AVOID IT (CE9 649 B1)
Discussing what happens with a Will when someone dies and the process when someone dies without a will. This is a general overview of the NYs estate administration process.

ONE-DAY WORKSHOP.
Instructor: Staff
CE9 649 B1 Meets: Tuesday, April 21, 7:00pm-9:00pm.
Fee: $45

THE ART OF THE POWER OF THE PROMISSORY NOTE (CE9 589 B1)
Many people make the mistake of thinking that a promissory note is just a legal document to maintain control over a loan. In fact, a promissory note is a financial vehicle that can provide significant value to the borrower in many situations, including retirement savings, asset protection, and estate planning.

ONE-DAY WORKSHOP.
Instructor: Jeffrey Levine
CE9 589 B1 Meets: Thursday, June 4, 7:00pm-9:00pm.
Fee: $45
REGISTRATION FORM

Please answer all questions on this form and send it together with your check, money order, or credit card information to:

OFFICE OF WORKFORCE DEVELOPMENT & LIFELONG LEARNING
Nassau Community College
One Education Drive
Garden City, New York 11530-6793

Make check payable to: Nassau Community College
OR fax the form with credit card information to: 516.828.3507

Last Name

Complete First Name

Address

City ____________________________ Zip ________________

Home Phone: ( ) __________________________ Cell Phone: ( ) __________________________

Work Phone: ( ) __________________________

*Birthdate: mm/dd/yyyy __ __/__ __/__ __ __ __ Have you ever taken any courses at NCC? 

*required*

Other

Have you ever taken any courses at NCC?

Yes

No

E-mail: ____________________________ NCC ID #: __________________________

COURSE SELECTION

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Total Amount: $

Non-Credit Refund Policy: Tuition is refundable when a course is canceled by the College. Tuition is refundable to the student whose written request for withdrawal has been received by the Office of Workforce Development & Continuing Education prior to the beginning of the class. A 50% refund of tuition may be made to the student who has applied in writing to the Office of Workforce Development & Continuing Education prior to the second session of the class. NO REFUNDS WILL BE MADE AFTER THE SECOND CLASS MEETING OF ANY CLASS. Please be advised that if a refund is due it will take approximately 2-3 weeks to be processed.

CREDIT CARD PAYMENT INSTRUCTIONS:

I authorize the use of my credit card account for full payment of the amount of my course registration as indicated on this non-credit registration application.

Students with overdue tuition and fees may be referred to a collection agency and will incur additional liabilities of up to 33% to cover all associated collection cost processes.

Step 1: Print Cardholder’s name

(as it appears on the credit card)

Step 2: Provide Cardholder’s signature:

Step 3: Please read: I certify that there is sufficient credit amount on the card listed below to cover the fee charges shown on the accompanying Registration Form. Otherwise, I understand the lack of approval by my credit card company will result in cancellation of this registration for non-payment.

Step 4: Card Information:

PLEASE Check ONE:  VISA  Mastercard  Discover  American Express

Card Number: __________________________ Date of Expiration: __ __/__ __/__ __ __ __