

Thursday Insights for May 2020 2:30 p.m. – 4:00 p.m.

May 7, 2020 – Employer Responsibilities when Hiring Foreign Nationals; *Presented by Ryan Alexeev, Esq.*

As an advisor of business owners, there are so many tasks you are responsible for helping your clients manage. Being a resource for your business owner clients for when they are trying to hire the right employees is essential for their success. As you know there are rules and regulations your clients need to follow when hiring an employee, but did you know there are additional rules and requirements they must follow when hiring a non-U.S. citizen? Over the next hour, Ryan will dive into employment-based immigration. She will provide you with information on different types of work status that allows foreign nationals to work in the U.S., requirements and responsibilities as the employer when hiring foreign nationals, and proper ways to fill out and re-verify I-9s for these employees.

May 14, 2020 – Social Security Optimization and Income Tax Strategies for Successful Families; *Presented by Maureen Verduyn, CFP, EA, Med and Nick Gardner, CFP*

One of the most important decisions you will make before you retire is when and how to claim Social Security benefits. The difference between the best and worst possible decision of when to start Social Security can be well over \$100,000. Join Maureen and Nick from The Financial Team to learn how the tax law changes may affect your benefits and solve the best after-tax combination for your sources of income – including the dreaded RMD.

May 21, 2020 – Pre-Empted for Accelerate Program



Taught by award-winning thought leaders, Julie Keyes, CEPA, Founder of KeyeStrategies, Chris Snider, CEPA, CEO of the Exit Planning Institute, and Joe Strazzeri, CEPA, Co-founder of the Southern California Institute and The Founders Group. Designed to grow your practice, build influence, and enhance exit planning win rate.

May 28, 2020 – Crisis Financial Implementation for the “Ailing” Entrepreneur; *presented by Yvonne Amrine, Esq. and Marty Burbank, JD, LLM*

What do you do when a business owner is struck with dementia or a debilitating disease? Of course, LTC insurance is the first option to be considered but what if they don't have it (as most don't), and they are in a crisis and/or want to be prepared? Learn the twists and turns of planning opportunities to qualify for benefits and not cause risk to the business and/or impoverish the family.

