

You are cordially invited to attend an educational workshop on...

Managing Health Care Expenses in Retirement: What Baby Boomers Need to Know About Medicare and Long-Term Care

Presented By: George Wealth Management

Date: 9/4/2024 11:30am to 12:45pm Lunch will be served

Location: Mountain City Club 216 West 8th Street Chattanooga, TN 37402

Most baby boomers will face a health care financial crisis in retirement because of inadequate or faulty knowledge of Medicare basics.

This one-hour educational workshop will begin with an overview of Medicare and end with a discussion of long-term care. It will acquaint CPAs with the way health care works for retirees, and how they can help clients plan for health care expenses and transition smoothly into retirement.

At this workshop, you will learn:

- How Medicare enrollment periods work — and what you need to do to avoid late-enrollment penalties for clients.
- How much clients can expect to pay in health care costs after going on Medicare.
- How Medicare works with private insurance to provide comprehensive coverage.
- Why most people pay too much for private insurance and how you can help clients avoid excess costs.

Why planning for higher health care costs in retirement is essential — including the possibility of long-term care.

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Workshop Policies

Cancellation policy: This workshop is free. Please contact the presenter to cancel.

To make a complaint, or for more information about program cancellation policies, please call Horseshoof Member Support at (888) 336-6884.

Pre-registration Required

Registration for this workshop is available at 423-267-6858 ex 1 reservation Mailbox

Workshop attendees earn up to one hour of CPE credit in Finance.

Additional Information:

Prerequisites: None

Who Should Attend?

- CPAs
- Other professionals

Advanced Preparation: None necessary, although a basic understanding of Medicare is helpful.

Program level: Basic

Delivery method: Group-Live

Seating is limited. Reserve your space now Call 423-267-6858 ex 1 or email angie.house@george-wealthment.com



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