Andy Landis
THINKING RETIREMENT
"Education for the abundant retirement"

Speaking Topics
For Financial Professionals

"Social Security 201: Mastering the Client Mysteries"

Are you overlooking the equivalent of $700,000 in your clients' portfolios? In this session you will unlock Social Security's top ten mysteries in an entertaining, humorous, and informative way.

- Have knowledgeable, professional answers to client questions about Social Security.
- Profit from tips and materials to instantly increase client service, deepen client relationships, and build your practice using Social Security expertise.
- Learn how Social Security works for real people like your clients.
- Discover how Social Security payments are computed, what's in it for working and non-working spouses (and even former spouses), when and how to apply, and what happens with work after retirement.
- Learn how to get quick, online payment estimates for any client's future scenario. See the bottom line on career changes like early retirement or switching to part-time.
- Hear a few good Social Security jokes.

"Social Security 202: Advanced Client Strategies"

Take your Social Security knowledge to the next level. Get a quick review of Social Security basics (worker, spouse, former spouse, and child benefits). Then probe deeper:

- Explore two vital strategies to maximize client payouts: File and Suspend, and Spousal-Only Restricted Claim
- Learn the impact of the Bipartisan Budget Act of 2015 on client strategies
- See sample payout comparisons for various strategies
- Discover new ways to immediately apply strategies in various client scenarios
- Browse software choices to polish client presentations
- All with the expertise and fun style of Andy Landis

More ->

"Medicare and Its Gaps: What You and Your Clients Simply MUST Know"

Healthcare costs threaten to bust retirement plans. Your clients know it and look to you for options and solutions. In this session you'll discover answers to crucial client questions:

- How does original Medicare work?
- What are Parts A & B?
- Are there deadlines for enrolling?
- Do I really need supplemental insurance?
- What's the best supplement for me?
- Where can I get unbiased information and advice?

After this session you'll be ready and able to answer client questions and direct them to valuable resources. And from now on, you'll tickle every client file for three months before their 65th birthday.

All Sessions

Suitable for: Keynote, general session, breakout session, chapter meeting, or in-house education.

Audience: Financial planners, insurance professionals, accountants, attorneys, trust officers, and other financial professionals who work with clients.

Time: 1.0 to 1.5 hours each.

Locations: Live presentations in Seattle area only (sorry, not available elsewhere).

Webinars: Each topic is available as an informative, interactive webinar, viewable anywhere. Save on meeting space, travel expense and down time—perfect for dispersed groups!

Fee: $500 per topic

Fee includes preparation, tailoring remarks to your group, and handout masters suitable for copying. Fee does not include copying of handouts. ***Consulting:*** *$200 per hour; $50 minimum.*

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Andy Landis is one of the nation's leading authorities on Social Security and Medicare through his practice, Thinking Retirement.

He is the author of *Social Security: The Inside Story,* and *When I Retire,* available from Amazon.com in print and Kindle formats. He is a regular blogger for the *Wall Street Journal's* "MarketWatch" site.

Andy conducts professional education sessions for FPA, AICPA, NAPFA; and client education workshops for financial firms and advisors. He has authored courses for the College for Financial Planning and AICPA, and numerous magazine articles. He was profiled in *Financial Planning* magazine and has appeared on Fox Business News and PBS.

Andy's background includes employment at the Social Security Administration, AARP, and multinational corporations. He is a past state president of the International Society for Retirement Planning.

Andy lives in Seattle with Kay, keyboards, camper, computers, cars, and sometimes kids.