



Andy Landis
THINKING RETIREMENT
“Education for the abundant retirement”

Speaking Topics For Employees, Clients, or the Public

“Social Security 101: From Mystery to Mastery”

Everyone pays for Social Security, but no one knows what they’re buying. It’s time to find out and seize control of your future finances! Andy’s most popular talk solves Social Security’s most puzzling mysteries in an entertaining, humorous, and informative way. You will discover:

- The ABCs of how Social Security works for real people like you and your family.
- How to get every dollar you have coming, without bureaucratic bother.
- What payments to expect for a spouse (working or non-working), former spouse, or children.
- The bottom line on career changes like early retirement, switching to part-time, or starting your dream business.
- Options for saving Social Security for future generations—or your own.
- A few good Social Security jokes.

Audience: Pre-retirees, retirees, and professionals who work with them.

Time: 1.0 to 1.5 hours.

“Social Security 102: Basics and Beyond—Advanced Planning Strategies”

Everyone pays for Social Security, but no one knows what they’re buying. Now learn the basics, plus advanced strategies to maximize your payments! This talk includes everything in Social Security 101, and then goes farther, exploring advanced claiming strategies. You will discover:

- The ABCs of how Social Security works for real people like you and your family.
- What payments to expect for a spouse (working or non-working), former spouse, or children.
- How to use advanced strategies like File and Suspend or Restricted Application to maximize your lifetime payout.
- The impact of the 2015 Budget Act, limiting access to advanced claiming strategies; who can still use the old rules; and ways to use the new rules to your advantage.
- A few good Social Security jokes.

Audience: Pre-retirees, retirees, and professionals who work with them.

Time: 1.5 to 2.0 hours.

“Medicare and Its Gaps: Rights and Options You Simply MUST Know”

How will you deal with staggering health care costs in retirement? Learn the simple facts about Medicare:

- When and how to apply
- What Medicare covers and doesn't cover
- Three pathways to fill Medicare's gaps
- How the 2010 health care reform affected Medicare
- Understanding your options with “Medigap” policies, Medicare Part C Advantage plans, Part D drug coverage, and Long Term Care insurance
- Cost ranges for every option

This informative, no-sales talk is valuable education before you reach Medicare age, or for learning your rights and options if you are already enrolled.

Audience: Pre-retirees, retirees, and professionals who work with them.

Time: 1.0 to 1.5 hours.

All Sessions

Suitable for: Client or employee retirement education; public forums.

Audience: Clients and prospective clients of financial planners, insurance professionals, accountants, and attorneys; employees planning for retirement; and members of the public attending a retirement event.

Time: 1.0 to 1.5 hours each. Allow 0.5 hour extra for “Social Security 102.”

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 workshops for Fortune 500 firms, financial professionals, and others. He has authored courses for financial planners and CPAs, and appears on radio and television.

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.