**Spokane Estate Planning Council**

**Presentation Outline**

**March 15, 2016**

**The A, B, C and D’s of Medicare**

**Presented by Greer Gibson Bacon**

5:45 – 6:00 p.m.

Greer Gibson Bacon, CFP® has more than 30 years of professional and supervisory experience in financial services. Over her career, she has held numerous industry licenses, attended the Cannon Trust School in personal and employee benefit trust, and earned the Certified Financial Planner™ professional designation. Bacon is founder and president of Asset Planning & Management, Inc. A *fee-only* registered investment advisor, it provides comprehensive financial planning and investment management services to individuals and families. Bacon is a current member of the Financial Planning Association and Spokane Estate Planning Council. Also, she is a past member of the Financial Industry Regulatory Authority Board of Arbitrators, and State of Washington’s Securities Advisory Committee, Financial Literacy Work and Financial Education Public-Private Partnership (FEPPP).

6:00 – 7:00 p.m.

Program Description: Continuing Education Credits

The 2015 Fidelity Investments Couples Retirement Study found that the biggest concern for 74% of all retirees is being able to afford unexpected health care costs. All estate planners must have a basic understanding of Medicare system help clients protect and preserve their financial resources. This program will discuss:

* Medicare Parts A, B, C and D. What do the different parts cover? How do you sign-up? How much does Medicare cost?
* Medicare supplemental insurance. What is it? Does everyone need it? How do you sign-up? How much does it cost?
* Retirement income planning. How is Medicare funded? What are the basic premiums and surcharges? What are the surtaxes on earned income and net investment income? What are the implications for retirement income planning?

7:00 – 7:15

Questions and Answers from the Audience:

1. What information do you still need to assist your clients?
2. Where to go for resources