

# CPE / CLE

## Financial Planning for Extended Care Expenses

Legislation and changes in the tax code continue to impact financial planning for extended care, with Financial Advisors, CPAs and Attorneys all seeing clients directly affected. With this CPE/CLE education, you will learn about provisions in the tax code and legislation as well as financial planning strategies to help mitigate extended care expenses.

### Continuing Education

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#### ***Continuing Professional Education (CPE)***

The American Institute of Certified Public Accountants (AICPA) and the National Association of States Board of Accountancy (NASBA) approve courses from registered providers of CPE.

#### ***Continuing Legal Education (CLE)***

Each state administers its own program, rules and regulations vary. To learn more, visit the Continuing Legal Education Regulators Associates (CLEreg) website.

### Approved CE Instruction

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OneAmerica is a provider for CPE/CLE, which can be provided in-person or virtually.

Mike Mazzoni, CLU®, LUTCF, CLTC

Mike is known for his knowledge, passion and engaging presentation style. A 20-year industry veteran, he devoted his career to LTC planning after his grandmother was diagnosed with dementia.

### The Great Income Gap

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This course explores financial planning concepts related to extended care expenses.

Participants will:

- Learn the current cost of care and the trends impacting future costs
- Understand what long-term care protection helps provide as part of a financial strategy
- Learn about personal and business planning strategies
- Learn about strategies using current tax laws and legislation to provide tax-free benefits

**Ref:** Section 7702B(b), 162 Executive Bonus, HIPAA, Pension Protection Act, SECURE Act



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