



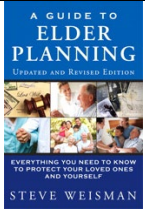
BEACON HILL
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BEACON HILL *Course-in-a-Book™ Series*

Elder Planning

#194819

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Course Information

Number of CFP® continuing education credit hours recommended for this course: 12
Beacon Hill Financial Educators course provider/sponsor number (for CFP Board): **1008**

Description

Elder Planning covers the financial, legal, and personal issues faced by seniors and their families, including practical insights and specific, innovative solutions for estate planning, investment planning, long term care planning, housing, Medicare, Medicaid, retirement planning, Social Security, veterans' benefits, asset protection, substitute decision making, income tax planning, age discrimination, protection from abuse and scams, end of life issues, and more.

Subject Codes

CFP Board: "A" Financial Planning Process, Retirement Planning.
NAPFA credit allocation: Retirement Planning (6 CE); Fundamentals of Financial Planning (6 CE).

Course Content

Course text: A Guide to Elder Planning by Steve Weisman (FT Press, 2013, 364 pages).
Study guide: Course information, learning objectives, chapter list of book.
Final exam (online): Sixty multiple choice questions.

Level of Complexity

Overview

CFP Board: Programs that provide a general review of a subject from a broad perspective or dive into basic knowledge on a specific skill or topic. Best suited for CFP® professionals seeking knowledge in an unfamiliar subject area and with entry level experience.

Instructions for Taking This Course

- **You must complete this course within one year** of purchase (If the course is "Expired," contact us and we will add the latest edition of the course to your account (no charge).
- **Complete the course by** following the learning objectives listed for the course and studying the text.
- **Once you have completed studying the course** and you are confident that the learning objectives have been met, answer the final exam questions (online).

Instructions for Taking the Online Exam

- **Log in to your secure account at www.bhfe.com. Go to "My Account."**
- A passing grade of at least **70%** is required on the exam for this course.
- You will have three attempts to pass the exam (call or email us after three unsuccessful attempts for instructions).
- The exam is not timed, and it does not need to be completed in one session.
- For a **printed copy** of the exam questions, open the exam and press "Print Exam."
- Once you pass the exam, the results (correct/incorrect answers) and certificate of completion appear in "My Account." A confirmation email is also sent.
- CFP Board and CDFA credit hours, if applicable, are reported on Tuesdays and at the end of the month.

Have a question? Call us at 800-588-7039 or email us at contact@bhfe.com.

Learning Objectives

As a result of studying the text, you should be able to meet the following learning objectives:

- Define the primary issues that senior citizens should consider for protecting assets.
- Recognize the unique planning considerations relevant to senior citizens in regards to credit.
- Recall the legal resources seniors have available to help them protect their assets.
- List the primary concerns that seniors should address regarding estate planning.
- Define the benefits of trusts.
- Recognize what seniors should be aware of about investing.
- Recall the income tax issues that seniors should effectively plan for.
- Define reverse mortgages and how they are used by seniors.
- Recognize the benefits of alternative housing options to seniors.
- Differentiate between the various types of retirement community living options available to seniors.
- Recall how seniors should plan for long-term care and disability.
- Define the primary planning considerations for Social Security.
- Define the primary planning considerations for Medicare.
- Define the primary planning considerations for Medicaid.
- Define the primary challenges seniors face in regard to scams and identity theft.
- Recognize the primary end-of-life issues that seniors should be aware of and plan for.

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