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GOLF
OUTING



June 17th



8:00 am-7:00 pm EST



Longue Vue Club
400 Longue Vue Drive
Verona, PA 15147

Agenda

8:00 am - Registration & Light Breakfast

9:00-9:50 am - CPE Session 1

10:00-10:50 am - CPE Session 2

11:00-11:50 am - CPE Session 3

12:00 pm - Lunch

12:55 pm - Announcements

1:00 pm - Shotgun Start

4:30 pm - Cocktails on the Terrace

5:30 pm - Dinner & Awards

10:00-10:50 am

Savvy Social Security Planning: Claiming Strategies CPAs, Attorneys, and Other Professionals Need to Know

Presented by the Fort Pitt Capital

Featured Speaker: Beth Lynch

Presentation Description

Social Security is often more complex than it appears, with decisions made today significantly affecting the total benefits your clients receive over their lifetimes. In this one-hour workshop, CPAs and attorneys will gain a thorough understanding of the rules and strategies for claiming Social Security benefits, equipping them to better guide their clients through this crucial process.

Learning Objectives

- An emphasis will be placed on coordinating the various types of benefits to maximize benefits over lifetime:
 1. Retirement
 2. Spousal
 3. Survivor

Highlights

- How Social Security benefits are calculated
- Factor clients need to consider when deciding when to apply for benefits
- Illustrations of lifetime income streams based on claiming ages and break even analyses
- Innovative spousal claiming strategies designed to give clients extra income
- How widows and widowers can coordinate survivor benefits with their own retirement benefits to maximize income
- Ways to minimize taxes on Social Security Benefits
- How to coordinate Social Security with other sources of retirement income



Beth Lynch, CFP[®], Financial Advisor, SVP - Fort Pitt Capital Group

Focus: Beth works with individuals and families to help them identify their financial goals by creating a financial plan to achieve those aspirations. She enjoys advising and educating clients, providing sound advice, and building strong relationships.

Career Highlights: Beth came to Fort Pitt Capital Group in 2018 with over 20 years of experience as a financial consultant. She has worked as financial

advisor at another Pittsburgh based RIA, as a Wealth Planner at PNC Advisors, and started her career at a brokerage and insurance company.

Education: MS, Finance, College for Financial Planning, BSBA, Robert Morris University, Executive Certificate in Financial Planning, Duquesne University School of Leadership & Professional Advancement

Community: Member of the United Way's Women's Leadership Council (WLC) of Pittsburgh. Committee Member for the Women's Center and Shelter of Greater Pittsburgh Annual Survivors' Event, Member and Past President (Pittsburgh Chapter) of the Financial Planning Association. Past Chairperson of the National Association of Professional Women (NAPW) – Pittsburgh Chapter. Member of Women for Economic and Leadership Development (WELD) of Pittsburgh. Member of the Advisory Board for Children's Institute. Member of the Athena Awards Host Committee.

Personal: Outside of work, Beth enjoys playing tennis, golfing, and spending time with her husband and son.