



MARCH HYBRID EDUCATIONAL PROGRAM

“STRATEGIES TO MAXIMIZE SOCIAL SECURITY BENEFITS”

TUESDAY, MARCH 21, 2023

THE UNION LEAGUE
140 SOUTH BROAD STREET
PHILADELPHIA, PA 19102

NEW PROGRAM FORMAT:
3:30 – 4:00 P.M. REGISTRATION
4:00 – 5:00 P.M. PROGRAM
5:00 – 7:00 P.M. COCKTAIL RECEPTION

Social Security is a critical component when planning for retirement. It is an extremely valuable pension program that provides guaranteed lifetime income with cost-of-living increases. However, to ensure that you do not leave any eligible benefits on the table, learn the considerations and claiming strategies which may be available to you to maximize your benefits. Such potential benefits include spousal, ex-spousal, child, child-in-care and survivor benefits—the more you know the more you can feel empowered by making the optimal Social Security filing decision in order to maximize benefits for you and your family.

One Education Credit for CLE (PA Only), Insurance (PA Only), CFP, CPA (PA Only), PACE and CTFA will be offered.

Speaker:

Ash Ahluwalia is the head of Social Security planning at OneTeam Financial. With nearly thirty years of experience, he is one of the nation's foremost experts on Social Security and oversees the development of claiming strategies to maximize retirement income benefits.

Social Security is the largest retirement asset for many Americans, often amounting to \$1 million or more of lifetime pension benefits from the federal government. However, being governed by more than 2700 rules, over 90% of filers leave money on the table. Ash has helped thousands of clients to customize the best strategy for their personal situation.

Ash is the former president and founder of National Social Security Partners, LLC (NSSP). He has two certifications in Social Security planning, National Social Security AdvisorSM and Certified in Social Security Claiming Strategies (CSSCS). For all of his efforts, expertise and leadership in Social Security planning, he was recognized with the “National Social Security Advisor of the Year” award in 2016 from the National Social Security Association.

After graduating from the University of Toronto with a Bachelor of Commerce degree, Ash obtained his Chartered Accounting degree (a Canadian CPA.) and CERTIFIED FINANCIAL PLANNER designation. He then went on to obtain an MBA from Wharton Business School.

Ash has been published in numerous newspapers and magazines for his expertise, including The Wall Street Journal, Barron's, U.S. News & World Report, and Financial Planning magazine. He is also a highly-sought-after speaker at conferences, webinars and industry events for consumers as well as legal, accounting and other financial professionals.

The Philadelphia Estate Planning Council does not render any legal, accounting or other professional services. The Council's programs and publications are designed solely to help professionals maintain their professional competence. In dealing with specific matters, the individual using any publication obtained through the Council or any information orally conveyed by speakers at programs sponsored by the Council or in materials distributed by the Council should research original sources of authority independently.

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REGISTRATION FORM

Luncheon Program Fee:

PEPC Members (In-Person OR Virtual): \$45 Non-Members (In-Person OR Virtual): \$65

Additional Fees:

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

\$5 additional charge for walk-in registrations at the door without pre-registration.

No-shows will be billed. No refunds after March 17, 2023

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

PEPC Member (\$45 per person) Non-Member (\$65 per person)

Participation Type: In-Person Meeting Virtual Meeting

CONTINUING EDUCATION INFORMATION:

(Fee: \$15 per Credit)

Continuing Legal Education (1 credit).....Attorney ID: _____

Insurance Continuing Education (1 credit).....License Number: _____

CFP® Continuing Education (1 credit).....Last 4 Digits of SSN: _____

CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.

PAYMENT INFORMATION:

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

Return by Fax: 856-727-9504 **Register Online:** www.philaepc.org

Questions: 215-486-6215 (*Registrations will not be accepted via phone*)