

Calendar of Events

April 25, 2024

Leveraging ABLE Accounts for Eligible Individuals with Disabilities Overview and Updates on

12:00 PM - 01:15 PM EST

This session will be held in conjunction with the NCVSCPA annual chapter meeting. We will start promptly at noon to elect our 2024-2025 Board Members. This should be approximately 10-15 minutes. The session begins immediately following the annual meeting and will run the normal 60 minutes for 1 CPE credit.

The Achieving a Better Life Experience (ABLE) Act offers more than eight million Americans with disabilities and their families the ability to establish a tax-advantaged ABLE savings account without fear of losing eligibility for certain public benefits, including Medicaid and Supplemental Security Income (SSI) payments.

Attend this session to separate fact from fiction and understand how ABLE accounts work. We'll review ABLE basics and provide updates on Virginia's direct-sold ABLEnow program and advisor-sold ABLEAmerica program.

Learning objectives:

Increase knowledge of the components of ABLE accounts and how they can support the financial needs of individuals with disabilities and their families

Understand the current status of ABLE accounts and opportunities to maximize their benefits

Incorporate ABLE accounts into your planning to enhance quality of life related to employment, education and community integration in both the short and long term.

Presenter Bio

Brittany Bullock joined Virginia529 in 2013 as a Financial Operations Analyst. Since then, she has moved into the role of Relationship Marketing Specialist, spending most of her time traveling the Central and Tidewater regions of the state educating individuals and families on the importance of ABLE accounts and how empowering they are for people with disabilities. As part of the marketing team, she also conducts virtual events and webinars both statewide and nationwide. Brittany has a B.S. in Business from Virginia Commonwealth University, with a concentration in International Business. She is passionate about helping others and looks forward to sharing this wonderful information with you all.

May 15, 2024

The Five Critical Components of a Financial Plan for Retirees

10:00 AM - 12:00 PM EST

A Financial Plan and Financial Planning mean different things to different people. A financial plan is definitely not a 170-page report that your client uses as a door stop. Financial planning certainly isn't just managing a portfolio. So then, what is it? It depends on where the client is. A financial plan for a young couple may be a road map to buy a new home, save for retirement, and send their kids to school. For a retiree, it's all about the strategies to get their money out in a tax-efficient manner, so they can do what they want to do, without having to worry about running out.

In this two-hour CPE course, Evan T Beach, CFP®, EA, AWMA®, will walk through the five critical components of a financial plan for retirees. He will outline not only the components of the plan but also the planning opportunities that exist in different stages of retirement.