

## NJSEA Dinner Meeting - Wednesday, July 8, 2015 6:00 p.m. – 8:30 p.m.



### OUR FEATURED SPEAKER

#### Edward J. Ryan, EA

Ryan Financial, Owner

Ryan Financial is a tax and accounting practice and financial services firm focusing on individuals and small business owners with locations in Rutherford and Union, NJ and Middleton, NY.

Ryan Financial offers financial services through HD Vest. Ed has been an HD Vest Chapter Director since 2001. He is also a Field Trainer and mentor to new advisors. Since 2010, Ed has been recognized as a top 75 advisor at HD Vest. He is also experienced with company accounting operations, private placements and purchases and sales of business entities.

He is an Enrolled Agent, a Registered Investment Advisor, and holds series 6, 62, 63 and 65 licenses as well as life, health, property and casualty and variable insurance licenses. Ed has also been a Director of the NJSEA since 2012.

### Topic: Taxation and Planning of Social Security

**Meeting Description:** For many, social security will be the mainstay of their retirement. Tax specialists and planners can play an important role in helping their clients make informed choices about Social Security. Understand the options available in each client's case and be sure you understand the tax consequences of your client's decisions.

**Date:** Wednesday, July 8, 2015

**Time:** Dinner: 6:00 p.m.

Seminar: 6:30 p.m. – 8:30 p.m.

**Location:** Crowne Plaza Hotel, 390 Forsgate Drive, Monroe Township, NJ (Exit 8A off the NJ Turnpike).

**Registration Fee:** \$40 members, \$50 non-members and guests. Includes buffet dinner.

**RSVP:** ("yes" only) to [jcappuccionjsea@aol.com](mailto:jcappuccionjsea@aol.com) or call (215) 736-9455 (to assure CE credit)

**Education Credits:** 2 CE or 2 CPA CPE or 2 CFP CE



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