

Seminars and Conferences

Akerman Hosts Seminar on Residency - Should I Stay or Should I Go?

How to Navigate Changes in Residency and Maximize Retirement Income through Proper Social Security Planning

February 18, 20, and 21, 2020

9128 Strada Place, Suite 10205
Naples, FL

Three Brickell City Centre
98 Southeast Seventh Street, Suite 1100
Miami, FL

777 South Flagler Drive, Suite 1100 West Tower
West Palm Beach, FL

Join us to learn how to successfully retire - from claiming Florida residency and understanding the retirement timeline to avoiding common pitfalls from our experts. Upon completion of this program, participants will be able to:

- Identify best practices to establish Florida residency in the current enforcement climate
- Find their social security sweet spot
- Understand domicile versus statutory residency versus allocation of income
- Plan for the state tax examination and discussion of recent cases and rulings
- Understand the retirement timeline

Related Work

State and Local Tax Consulting and Controversy
Tax
Trusts and Estates

Related Offices

Miami
Naples
West Palm Beach

- Identify common mistakes in estate planning
- Maximize social security benefits under the new rules

Our speakers include nationally recognized New York and Florida lawyers and CPAs with local knowledge and experience in defending against the aggressive tactics of state auditors, including:

Alvan Bobrow, Esq.
Partner, Tax
Akerman - New York

Ash Ahluwalia, CFP, MBA
President
National Social Security Partners, LLC

Barry Horowitz, CPA, MST
Partner, Practice Leader State & Local Tax Services
Withum - New York, NY

Cynthia Bock, Esq. (Speaking at Naples Seminar)
Partner, Trusts and Estates Practice
Akerman - Naples

In conjunction with Withum and National Social Security Partners, LLC, Akerman offers this event at three locations. Please select the date and location that fits your availability.

Tuesday, February 18, 2020

Akerman
9128 Strada Place, Suite 10205 | Naples, FL
Wine and Cheese Event | 4:00 pm - 6:00 pm
Guest Speaker: Cynthia Bock, JD, LLM
1 CPE in Taxes

Thursday, February 20, 2020

Akerman
Three Brickell City Centre
98 Southeast Seventh Street, Suite 1100
Miami, FL
Registration 8:00 AM | Presentation 8:30 am - 10:30

am

1 CPE in Taxes

Friday, February 21, 2020

Akerman

777 South Flagler Drive, Suite 1100 West Tower

West Palm Beach, FL, 33401

Registration 8:00 AM | Presentation 8:30 am - 10:30

am

1 CPE in Taxes