

Social Security Basics & the Key Filing Decisions Facing Older Employees



Part 1 of Social Security & Medicare Essentials Series

After a decade of historic growth, America's aging workforce has been blindsided by the unprecedented disruption caused by Covid-19. The sudden combination of layoffs and severe volatility in the financial markets has led many older employees to rethink their retirement plans- and the Social Security & Medicare filing decisions they are built upon.

This fast-paced, engaging 3-part webinar series for HR & Benefits professionals explores some of the challenges awaiting these older employees as they navigate the uniquely complex eligibility and enrollment landscape where retirement & healthcare benefits intersect with Social Security & Medicare... the foundational programs for retirement in America.

Social Security content covered in this presentation includes...

**Eligibility and the Benefit Calculation Formula,
Considering Early vs Delayed Filing
The Annual Earnings Test,
Benefits by Marriage (including Benefits after Divorce)
Taxation of Benefits
Windfall Elimination Period (WEP)
Government Pension Offset (GPO)
Importance of a *mySocialSecurity* account.**

3 Learning Objectives

- 1. Acquire a solid knowledge base regarding the basic benefit structure of Social Security.**
- 2. Understanding the unique factors older employees need to consider as they evaluate their filing options.**
- 3. Develop an integrated awareness of Social Security eligibility and enrollment issues in the context of work-related retirement benefits, thus becoming a more effective 'frontline' resource for older employees.**



*This program is valid for 1.0 PDC toward SHRM-CP and SHRM-SCP recertification.
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The Turning 65 Workshop is an approved education provider for World at Work.