

This program is sponsored by  
University of Vermont Extension



**Presenter:**

Peter Weinbaum, JD

Peter Weinbaum began focusing on Social Security retirement benefits in 2010 and has studied the area intensively since that time. He presents approximately two dozen seminars and webinars on the subject in the course of a year, and regularly consults with individuals and couples on their Social Security retirement benefit options.

For nearly three decades Peter led the advanced planning unit at a major mutual life insurance company, consulting with financial services professionals, attorneys, and CPAs in relation to their clients' estate, business, and retirement planning arrangements. During that time, he worked with advisors to some of the wealthiest families in America, while also assisting thousands of working people and small business owners by providing technical back-up to their advisors.

Peter earned his Bachelor of Arts from Harvard University in 1967 and his Juris Doctor from the University of Michigan Law School in 1970, where he served on the *Michigan Law Review*.

**Coordinators:**

Seth Anderson, EA

Glenn Rogers, Professor Emeritus,  
UVM Extension

He was admitted to practice law in Massachusetts (1971) and in New Hampshire (1978). He also holds a Master of Education in counseling from the University of New Hampshire. He has earned the Chartered Life Underwriter, Chartered Financial Consultant, and Certified Senior Advisor designations, and was formerly a Registered Representative and an Investment Advisor Representative through Equity Services, Inc.

Before embarking on his career in the financial services industry, he served for four years as Assistant Dean at Vermont Law School, engaged in the private practice of law, and spent several years in higher education administration.

He has been an active member of the Board of Directors of the [Small Business Council of America](#) for more than 20 years, and in 2002 was the recipient of the Connie Murdoch Award for outstanding service to that organization.

**His practice focuses on four main areas:**

1. Raising awareness about the complexity of the Social Security system and the opportunities it affords. He does this by writing about the topic and presenting seminars
2. Analyzing an individual's or couple's Social Security picture in light of their expressed priorities
3. Explaining the most promising options available to them
4. Encouraging them to make their decisions with the help of their financial advisor

*What he DOES NOT do is tell them what they "should" do.*

EXTENSION

## What Your Clients Should Know About Social Security



Visit

[www.uvm.edu/extension/taxschool](http://www.uvm.edu/extension/taxschool)

November 4, 2014 Essex Jct., Vt.

November 10, 2014 Killington, Vt.



# \* NEW FOR 2014 \*

## What Your Clients Should Know About Social Security

**Presenter: Peter Weinbaum, JD**  
"The Social Security Maven®"

There is far more to Social Security planning than meets the eye. The system is very complicated, literally hundreds of options, and many sophisticated clients and advisors are unaware of significant opportunities and pitfalls in the claiming process. Planning is ESSENTIAL! This session is designed to help you help your clients avoid leaving thousands of benefit dollars on the table -thus increasing client satisfaction and client retention.

"... Informative ... Thought Provoking"  
"... A home run"  
"... truly Peter Weinbaum is the Social Security Maven"

This school is offered at each location the DAY BEFORE the two day tax school.

### Registration Fee:

**\$39.00 WITH the two-day tax school**  
**\$59.00 to attend this session only.**

### Dates

**November 4, 2014 (Tuesday 3:00-5:00 p.m.)**  
Champlain Valley Expo, Essex Junction, Vt.

**November 10, 2014 (Monday 3:00-5:00 p.m.)**  
Killington Grand Hotel, Killington, Vt.

Call 800-621-6867 for the UVM room block information for Killington. For driving directions and resort information, visit:  
[http://www.killington.com/winter/plan/getting\\_here/directions](http://www.killington.com/winter/plan/getting_here/directions)

**Schedule** 2:45-3:00 p.m. Registration  
3:00-5:00 p.m. Program

Time for additional Questions

**Registration Opens: July 1, 2014**

### Registration Fee:

**\$39.00 WITH UVM two-day Tax School**  
**\$59.00 to attend this session only.**

### Cancellation Policy & Fees -

(except medical, family or military emergency)

More than 15 days prior to school \$20

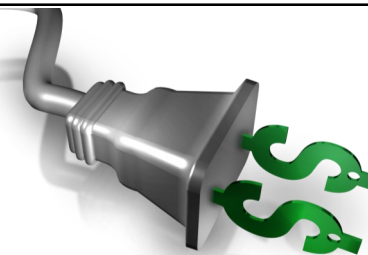
Less than 15 days prior to school \$30

Site Switching \$10

No refund once school is underway

### Two ways to register:

1. ONLINE at the Tax School website [www.uvm.edu/extension/taxschool](http://www.uvm.edu/extension/taxschool)  
Visa and MasterCard accepted; **cash payments are not accepted through online registration**
2. MAIL the enclosed registration form  
with check payable to UVM to  
UVM Extension Tax School  
c/o Elaine Burnor  
278 South Main St., Suite 2  
St. Albans, VT 05478-1866



Questions? Visit our website at [www.uvm.edu/extension/taxschool/](http://www.uvm.edu/extension/taxschool/) or call 1-800-639-2130 and ask for Elaine Burnor or Peggy Manahan

Issued in furtherance of Cooperative Extension work, Acts of May 8 and June 30, 1914, in cooperation with the United States Department of Agriculture. University of Vermont Extension, Burlington, Vermont. University of Vermont Extension, and U.S. Department of Agriculture, cooperating, offer education and employment to everyone without regard to race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital or familial status.

To request a disability-related accommodation to participate in this program please contact Elaine Burnor at 800-639-2130 by October 06, 2014

