

Host: Tri-Counties Regional Center

This workshop provides the core information needed to assist a beneficiary in financial planning and benefit management.

Rated the BEST WORKSHOP on BENEFITS - by all previous audiences

Benefits and Employment in 2017 MediCal, Medicare, Social Security, and SSI

January 27, 2017

How to earn significant income AND protect medical benefits.

Amanda R.,

Community Services Northwest

“I was recently in one of your trainings in Vancouver, WA. I just wanted to tell you how helpful everything you shared has been. I have had major questions answered because of the thoroughness of the information you gave us. Thank you.”

(Unsolicited)

Important Points Covered:

How will the new medical criteria for Mental Disorders (mental illness, intellectual disability, autism) affect new applicants and current beneficiaries? (Important)

New procedure for determining the performance of Substantial Gainful Activity.

How to manage benefits to avoid the loss of medical benefits.

When can work incentives reduce the amount of income SSA counts?

How much can a person earn?

Judy F., SSA, PCBDD, OH

“I wanted to thank you for the most informative in-service that I have been to in my 30 year career. You are an excellent resource and I found your training to be most beneficial.”

(Unsolicited)

Presented by Michael Walling

Why is this workshop better than others?

1. Receive clearly explained information on how income effects medical benefits and eligibility for SSDI and/or SSI !

Numerous examples are used to explain the work incentives!

2. Mike adapts the content and material to the questions and needs of the audience.

3. Mike is a professional trainer with **25 years experience** in presenting and teaching, focusing on disability benefit programs and employment. He has presented **over 2,700 workshops** since 1993. He is among a few professionals who know and are able to teach this topic.

4. Mike strives to meet the needs of each member of the audience. Numerous opportunities are available to ask questions. At every workshop, his goal is to have audience leave with useful information and the ability to use this information to serve individuals with disability.

Take a day to learn.

The day will make a difference for those you serve.

- 1. What four events that must occur before a person can terminate from SSDI while working?**
- 2. How can a person earn \$37,184 and maintain eligibility for SSI and MediCal?**
- 3. How can someone earn more than \$1,170 per month and still receive SSDI and Medicare?**
- 4. Does a beneficiary's financial plan incorporate how wage and other income impact the payment(s) from Social Security?**

The Presenter:

Michael Walling, M.Ed., is the author of The Guide: To Social Security Programs and Work Incentives, 24th Edition, 2016, and other publications and webinars on SSA benefits. He is highly regarded for his ability to explain this subject in “plain English” and to teach this subject to beneficiaries and professional novices.

Michael currently consults with a variety of states and organizations on benefit counseling services, employment services, medical benefits, and related matters. He travels throughout the country to provide workshops to state agencies and organizations.

Many professionals return annually for updates, because he can take a dry subject and make it interesting. He integrates his prior experience as a special education teacher, a director of a large vocational program, and his daily assistance to individuals and families into the examples provided.

January 27, 2017
Tri-Counties Regional Center
3450 Broad Street, San Luis Obispo, CA 93401

Registration Fee: \$109.00 per person

(If you register and pay for three people - one additional registration is free)

Workshop registration begins at 8:30. Presentation begins at 9:00 and concludes at 4:00.

Fee includes handouts and refreshments. Lunch is not provided. All registrations will be confirmed.

Payment can be sent after you register online or by fax. You can bring the payment to the workshop.

CONFIRMATION WILL BE EMAILED WITHIN ONE WEEK OF THE WORKSHOP.

NAME: _____ TITLE: _____
AGENCY: _____
STREET ADDRESS: _____
CITY: _____ STATE: _____ ZIP CODE: _____
TELEPHONE: (____) _____ FAX: (____) _____
E-MAIL: _____

We **do not** accept Purchase Orders. The registration fee **must** be paid by the day of the workshop.

Payment by check can be brought to the workshop.

OR - Complete this section if payment is by credit card. (Visa, Master Card, American Express only).

Card Number: _____ - _____ - _____ - _____

Expiration Date: ____/____ Security Code: _____ (V/MC - Three digit CVV Number (back of card)
(Amex- four digit CVV number (front of card))

Zip code for billing address for credit card: _____

Signature: _____

Register online at <http://www.benefits-training.com>

OR fax this registration form to reserve your seat. Seating is limited.

Fax to (610) 388-2379 Email questions to: wallinginc@aol.com

Mail Registration To: Benefits Training and Consulting P.O. Box 1483, Chadds Ford, PA 19317
Fax Registration To: (610) 388-2379 (secure location) For More Information Call: (610) 696-1551
Make checks payable to: Benefits Training and Consulting

(1) Cancellation received, **in written or faxed form**, before the workshop are refundable or may be applied to future workshops. Please note: if you do not cancel and do not attend, you are still responsible for payment. Substitutions may be made at any time. (2) Benefits Training and Consulting reserves the right to cancel any workshop and refund registration fees due to insufficient enrollment. We are not responsible for travel, lodging, etc. if a workshop is canceled.