

FINRA Lists IRMAA Certified Planner's IRMAACP as Industry's First Professional IRMAA Designation

Lincoln, Nebraska – IRMAA Certified Planner is proud to announce that FINRA, The Financial Industry Regulatory Authority, is now listing the IRMAA Certified Planner Designation (IRMAACPtm) for Medicare IRMAA planning as a professional designation.

IRMAACP is the first certification to assist professionals, from CPAs to Financial Advisors to Attorneys, in navigating and planning for Medicare's IRMAA. With education on advanced planning, impacts on retirement plans, and training on appellate scenarios for clients, IRMAA Certified Planner is transforming how financial professionals conduct business and increase service value.

About 99% of American pre-retirees or retirees, financial advisors, CPAs, and attorneys are not familiar with IRMAA or what it is. If a pre-retiree or retiree generates a certain level of taxable retirement income in retirement, they run the risk of their Social Security Net Benefit being greatly reduced or eliminated upon retirement.

What is IRMAA (Medicare's Income Related Monthly Adjustment Amount)?

IRMAA are surcharges that are added to an individual's monthly Medicare costs. These surcharges are taken directly out of their Social Security benefit and are based on the amount of income they are receiving in retirement from various sources such as a pension, Social Security, W2 wages, investments, or a combination of these different types.

Financial professionals who complete the 8 hours 8, CE-credit course can now display the IRMAACP credential for Medicare IRMAA and Social Security planning.

"To ensure easier access to this information, those who enroll in the program by November 12 receive a 20% discount," said IRMAA Certified Planner (ICP) Co-founder Mark Annese. Enrollees should use code "FINRA2023" when signing up for the course. Mark Annese added in the statement, "Our FINRA listing as a professional designation reflects not only the unique nature and quality of our information, but it underscores the importance of planning that is unknown to the majority of financial professionals. We're honored to provide IRMAA education and designation for all financial professionals to help better serve their clients."

With the recent release of more than 6 million IRMAA surcharge letters directly to individuals, as well as the 2024 Medicare IRMAA brackets being published, IRMAACP is at the forefront of advanced planning and investor retirement plan stress testing. Hundreds of financial professionals throughout the US have completed the program; according to ICP, the list of designee's practice areas includes:

CPAs: Identification of tax pitfalls created by IRMAA and how to circumvent/mitigate these pitfalls
Financial Advisors and Insurance Professionals: Retirement income effects on Medicare

premiums and how to fine-tune assets allocation

Attorneys: Educating on how IRMAA affects estate planning, tax planning, and wealth distribution

Long-Term Care Agents: Leveraging IRMAA to create tighter relationships with Financial Advisors and CPAs and boost production

IRMAA Certified Planner's chief mission is to provide individuals, as Financial Professionals, with the highest level of education about the risks of IRMAA in retirement and the tools to help their clients plan more appropriately. By providing this education, tools, and situational IRMAA cases, Financial Advisors will be able to implement IRMAA planning into their client's retirement strategy.

FINRA does not approve or endorse any professional designation, and the regulator says that inclusion in its database does not mean it considers the designation to be acceptable for use by a registered representative.

About IRMAA Certified Planner

IRMAA Certified Planner focuses on IRMAA rules, regulations, income, and tax ramifications to help financial professionals obtain an IRMAA Certification. Throughout the process, the organization educates Financial Advisors on understanding the impact of IRMAA on their client(s) Social Security Net Benefit, Financial planning solutions to avoiding, and the appeals process if an Advisor's clientele is impacted by IRMAA when they enroll in Medicare. After gaining the certification through IRMAA Certified Planner, financial professionals will be able to not only help current clients but also positively impact their business model.

More information

To learn more about IRMAA Certified Planner and its new listing as the IRMAA Certified Planner Designation, please visit the website at www.irmaacertifiedplanner.com.

Source: <https://thenewsfront.com/finra-lists-irmaa-certified-planners-irmaacp-as-industrys-first-professional-irmaa-designation/>

About IRMAA Certified Planner

Get to know more about IRMAA Certified Planner, and what we do. We exist to help educate financial professionals about the concepts, rules and regulations surrounding Medicare's IRMAA.

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