

James Lange, Acclaimed CPA/Attorney, to Co-Host Virtual Summit for Parents of a Child With a Disability, Feb. 12, 2024

LOS ANGELES, CA, UNITED STATES, February 6, 2024 /EINPresswire.com/ -- James "Jim" Lange, CPA, best-selling author, and attorney, is set to co-host the ["Retire Secure for Parents of a Child with a Disability"](#) summit, which is scheduled for Monday, February 12, 2024. The comprehensive virtual summit will bring together the three co-authors of the recently released best-selling book to empower parents of a child with a disability in planning for a secure financial future for their child.

The summit will provide comprehensive and invaluable information, ensuring parents have all the necessary facts to retire with financial security and be confident in the well-being of their child with a disability. Lange will provide an introduction session from 10:00 to 10:20 a.m. (Eastern), during which Jim will cover the essentials, emphasizing the significance of precise planning and guiding attendees on which sessions to prioritize.



James Lange

The summit is broken down into three critical sessions led by each author.

Session One, 10:20 am – Noon (Eastern), will be led by Deborah McFadden, Former United States Commissioner of Disabilities. She will spearhead "Critical Steps to Get Your Child Approved for SSI or SSDI in Order to Receive Cash Benefits, Tuition, Medical, and Other Benefits." In her session, attendees will learn the essential steps to get their child approved for Supplemental Social Security Income (SSI) and later Social Security Disability Income (SSDI) after turning 18. Explore the benefits of obtaining the "Golden Ticket" for significant support. The informative presentation will address various questions, including exploring the eligibility of participants' children for programs despite high incomes, examining the potential for extensive financial assistance that encompasses tuition and living expenses, and considering the viability of out-of-state college options. Attendees can also pose specific questions concerning their child and the

associated disability.

Speaker Julieanne Steinbacher, CELA, will present Session Two 12:30 – 2:30 pm (Eastern), "Trust & Estate Planning for Families with a Special Needs Child." During this informative discussion, Steinbacher will delve into the importance of estate planning, including wills, trusts, and special needs trusts, to safeguard government benefits and secure financial resources for a child with a disability. Parents will walk away understanding the critical conditions for a "stretch IRA" when using an IRA or a retirement plan to fund the trust. The presentation will delve into key topics, including the necessity of fundamental legal documents that apply universally, the significance of regular reviews of existing legal plans to ensure their ongoing relevance and compliance with current legal standards, and more.

"Join us as we discuss how families with individuals with special needs can best be prepared for what the future may bring," says Lange.

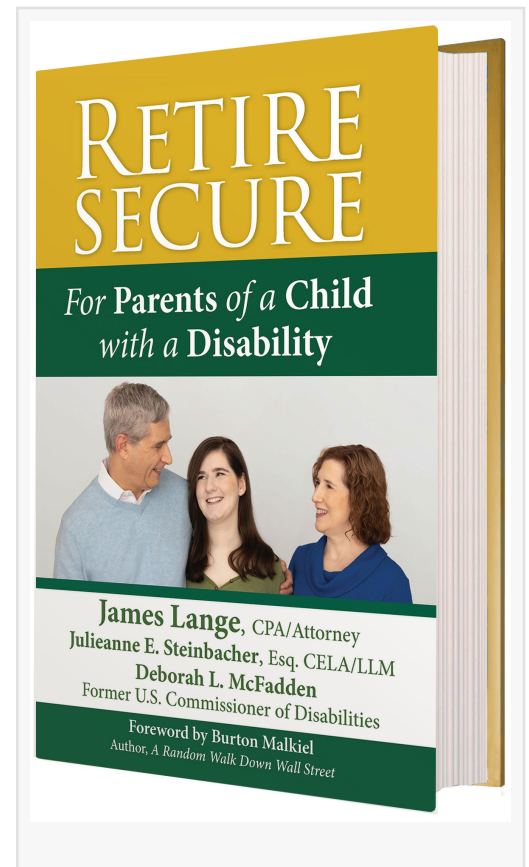
Lastly, session three, 3:00 – 5:00 pm (Eastern), "How Strategic Roth IRA Planning Can Make Your Disabled Child Financially Secure for Life," taught by speaker Jim Lange, will teach parents how to explore long-term Roth IRA conversion plans and the crucial decisions surrounding whether, how much, and when to convert. "Assumptions and personal circumstances may differ, but using what we deem are sound 'assumptions,' many families who get the Roth conversion planning correctly could be financially better off by hundreds of thousands," explains Lange.

Lange says all attendees will receive a free digital copy of the recently released best-selling book "Retire Secure for Parents of a Child with a Disability." Additional bonuses will be announced during the event.

Jim Lange, a recognized authority in tax and estate planning, holds the endorsement of The Wall Street Journal 36 times. With a prolific writing career, he has authored nine best-selling financial books, offering invaluable insights for optimizing the assets of IRA and retirement plan owners. Endorsed by esteemed experts like Charles Schwab, Burton Malkiel, Larry King, Jane Bryant Quinn, Roger Ibbotson, and many others, Jim's expertise includes Roth IRA conversion and SECURE Act strategies. His proficiency in these areas played a pivotal role in crafting a tailored solution for his daughter, who has a disability.

Those interested in attending can register to attend one, two, or all three sessions at

<https://disabledchildplanning.com/Summit/>



For more information about James "Jim" Lange, click here: <https://paytaxeslater.com/>

Amanda Kent
Boundless Media USA
+1 313-403-5636
[email us here](#)

This press release can be viewed online at: <https://www.einpresswire.com/article/686459822>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2024 Newsmatics Inc. All Right Reserved.