

Social Security & Financial Planning 2008

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A practical guide to financial planning and taxation issues relating to social security payments

Social Security & Financial Planning 2008 provides tax and financial planning information, tips and guidance appropriate for anyone who provides social security and financial planning advice to their clients, as well as tax educators and students. This easy-to-read resource allows a thorough analysis into clients' goals and overall financial situation, using the most practical and up-to-date information.

The changes to the pension assets test and the superannuation regime have widened eligibility for the age pension for hundreds of thousands of retirees who haven't previously been eligible. With the help of this practical guide, pensioners, allowees, senior Australians, farmers and families with children can maximise their legitimate entitlements by avoiding some of the common traps.



Features

- Concise, single volume with intuitive layout and detailed indexing
- Detailed commentary and step by step guide to dealing with the tax implications of social security
- Companion volume to the *Australian Financial Planning Handbook* and *Death & Taxes*
- Practical, worked examples

Benefits

- Allows faster, more convenient research & location of relevant information
- Guides you through tax and social security principles, providing greater understanding of current industry practice
- Facilitates further research to provide a broader understanding of the full spectrum of short and long term financial planning
- Enables a greater depth of understanding of the practical application of principles, helping practitioners to achieve the most beneficial outcomes for clients

Contents:

- Overview of the Social Security System
- Assistance for families with children
- Income support payments
- other assistance for pensioners and allowees
- Factors affecting entitlement
- Family farm issues. Tax offsets (rebates) and Commonwealth Government payments
- Assessment and strategies for superannuation benefits
- Investment considerations for recipients of Commonwealth Government payments
- Estate planning
- Reform measures
- Appendices

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