

The Corporation for  
Social Security Claiming Strategies  
*Helping plot the course to a better retirement*

## About Us

The Corporation for Social Security Claiming Strategies is the creator and provider of the training course for the *Certified in Social Security Claiming Strategies (CSSCS)* designation. Our organization is the only comprehensive retirement income training organization in the financial services industry dedicated exclusively to educating professionals on the nuances of Social Security retirement planning.

With corporations eliminating more than 84,000 pension plans since 1985, over a decade of unprecedented and ongoing market volatility, a Social Security system that has over 2,000 filing rules and a government workforce prohibited from dispensing advice, the ability to offer true expertise on the topic of when and how to develop a Social Security filing strategy is paramount to helping retirees remain financially viable throughout retirement.

The CSSCS certification program is designed to provide professionals, whether financial, legal, human resource or otherwise, with the deep foundational knowledge needed to help clients, regardless of circumstance, find the most effective Social Security retirement claiming strategy available to them.

Our paramount goal is to provide our students with a working knowledge of the myriad of factors that play a role in determining how retirees can achieve the maximum benefit available to them from Social Security and, in so doing, provide a solid foundation upon which an overall retirement income plan can be built.

With a system many claim has hundreds, thousands or even millions of possible filing combinations, we believe the mere knowledge of 7 or 8 “simple secrets” to Social Security coupled with access to calculators that render maximum lifetime benefit and breakeven points is not enough to accurately advise clients on the claiming strategy that is right for them, nor is it a sufficient basis upon which a lifetime income plan should be built.

Moreover, clients today approach the topic of retirement income planning with a keen awareness of the issues surrounding their finances and are looking not just for answers about what may be their next steps. Rather, today’s savvy retirees demand a specific, detailed explanation as to how and why a recommended plan will work. This course has been designed to empower you as an advisor to answer those difficult questions.

The Corporation for Social Security Claiming Strategies and the CSSCS Board of Standards has built the training curriculum and testing program in accordance with the guidelines set forth by the National Commission for Certifying Agencies, Institute for Credentialing Excellence.

## Program Offerings

Our membership levels are designed to suit the varying needs of advisors.

	<b>Gold</b>	<b>Platinum</b>
<b>Comprehensive Guide</b>	✓	✓
<b>Annual Guide Update</b>	✓	✓
<b>Online Course</b>	✓	✓
<b>Ask the Experts</b>	✓	✓
<b>Advisor Tool Kit</b>	✓	✓
<b>Leads Listing</b>		✓
<b>Certification</b>		✓
<b>Program Fee</b>	\$499.99	\$749.99
<b>Annual Renewal</b>	\$149.99	\$299.99

**NOTE: The live classroom training is \$549 for Gold Membership and \$799 for Platinum Membership**

Group discounts are available and we encourage all Training Supervisors and OSJ's to contact Jared Weiss at (855) 201-0449 for more information.

In an effort to make our program as convenient as possible for students, we will be offering three curriculum options:

- ✓ Online Course
- ✓ Live Classroom Instruction
- ✓ Webinars – Coming Soon!

## Program Components

***Comprehensive Guide to Social Security Retirement Benefits and Social Security Claiming Strategies:*** Our in-depth 14 chapter guide covers all areas of Social Security retirement benefits including, but not limited to, spousal benefits, survivor benefits, taxation, same-sex marriage, Windfall Elimination Provision, and the Government Pension Offset to name a few. Each chapter contains a summary of key concepts as well as practice tips highlighting how the rules can be applied in your day to day practice.

***The Advisor Tool Kit:*** contains all of the tools you'll need to be successful including:

- ✓ ***The Formula Sheet*** – a summary of the mathematical formulas and calculations needed to efficiently analyze Social Security retirement cases.
- ✓ ***The Key Definition Sheet*** – a quick reference for the relevant terms and acronyms associated with Social Security retirement benefits;
- ✓ ***The Quick Reference Guide*** – a summary of the critical tables and charts needed to analyze any case;
- ✓ ***The Timeline*** – a chronological summary of important dates and concerns for those at or nearing retirement.
- ✓ ***Marketing Materials:*** proprietary marketing pieces such as the “Life Span of a PIA” that help crystalize the concepts important to clients. Note: Compliance approval may be needed before use with the general public.

***Online library:*** access to hundreds of pages of materials including official SSA Statements, POMs references, FAQ's, articles of interest, newsletters and more.

***Ask the Experts:*** direct access to our staff of Social Security experts who collectively enjoy nearly 70 years of experience with the Social Security Administration.

***Certification:*** as a *Certified Social Security Claiming Strategist* upon successful completion of our 100 question, multiple choice examination

***Leads Listing on the CSSCS website:*** identifying the contact information for all candidates who successfully complete the *Certified in Social Security Claiming Strategies* designation.

## Meet Our Leaders

Our expert team at the Corporation for Social Security Claiming Strategies is uniquely qualified, not only to build the most comprehensive, advisor-centric, educational program in the Social Security retirement space, but deliver ongoing, real time support to those advisors who enroll at either the Gold or Platinum level.

### **Cheryl Robertson, JD – President and Founder**

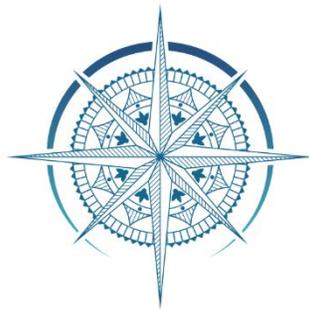
Cheryl graduated from Northeastern University with a Bachelor of Science degree in Criminal Justice. She received her J.D. from Roger Williams University School of Law, where she was proud to have served as Managing Editor of the Roger Williams University Law Review and was pleased to have been selected as a member of *Who's Who in American Colleges and Universities*. Upon graduation, Cheryl began her legal career as an Associate with a labor and employment firm in Boston, Massachusetts and subsequently opened a private practice in Providence, Rhode Island. Cheryl stepped away from the practice of law upon the birth of her first child and stayed home for the next 10 years raising what grew to be her delightful family of five children. Upon returning to the workforce, Cheryl took the steps necessary to become a licensed financial services professional and quickly realized the vast majority of current and prospective retirees did not have access to the advice and resources required to make an educated decision on, what in most cases, will prove to be one of the most critical financial decisions they'll ever make; when and how to claim Social Security retirement benefits. To that end, she utilized her finely honed legal skills to research, design and author an educational platform to do just that: provide advisors with the information, tools, skills and ongoing support they need to become experts in building retirement income plans founded on the guarantees of Social Security. In 2013, the Corporation for Social Security Claiming Strategies was formed and one year later, A Comprehensive Guide to Social Security Benefits and Social Security Claiming Strategies was launched endeavoring to provide advisors with the knowledge necessary to advise clients on the intricacies of the Social Security system and teach them to utilize that information as the foundation for retirement income plans sustainable throughout their client's lifetime and beyond.

## **Stephanie Burkland – Lead Social Security Expert**

Stephanie Burkland has worked in the Social Security arena for over 35 years. Her first 25 years were spent as an award winning Social Security Administration claims representative earning sixteen “Recognition of Contribution” awards, four “Superior Performance” awards, one “Special Act of Service” award and was regularly recognized by her superiors as, “a motivating influence to other Social Security Administration employees!” After her distinguished career with the Social Security Administration, Stephanie worked as a Social Security benefits advocate for numerous private sector firms. Once again, Stephanie’s performance was exceptional as evidenced by the numerous awards and recognition she received from her corporate and individual clients. These awards include the prestigious “Extra Mile” award given by the Mental Health Association of Westchester, New York. In addition to the recognition she received for her advocacy work by her clients and even while working in the private sector, Stephanie was also recognized by the Social Security Administration for her efforts to expose a systemic flaw in the claims paying procedures for certain beneficiaries. Her work resulted in a NATIONWIDE refresher training of all Social Security Administration payment center benefit analysts. As an award winning, front line, hands-on, Social Security expert, Stephanie is uniquely qualified to lead our in-house team of experts in their efforts to meet the ongoing needs of our membership.

## **Jared Weiss – Vice President, Business Development**

Jared graduated from Northern Arizona University with a B.A. in Anthropology. He also attended James Cook University in Queensland, Australia where he studied Aborigine culture. Jared began his career as a Registered Rep and independent producer where he worked in his family business in San Diego, CA. Jared later became a specialist in fixed indexed annuities and life insurance. He later moved from San Diego to Des Moines to raise his family where he took a position with a National Marketing Organization. Most recently, Jared worked for a leader in the fixed indexed annuity space, American Equity, as a Regional Marketing Director. In his role with American Equity, Jared saw a growing need to educate advisors on the complexities of Social Security Claiming Strategies. So much so, that Jared accepted a position with CSSCS as Vice President of Business Development in January of 2015. In addition to his passion for helping educate advisors, Jared holds his Iowa insurance license and CSSCS designation.



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[www.csscs.org](http://www.csscs.org)

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