

Household Information

PERSON A

First Name

Last Name

Male

Female

Date of Birth

PERSON B

First Name

Last Name

Male

Female

Date of Birth

ADDRESS

Street

City

State

Zip

Home Phone

Work Phone

Email Address

Marital Status

Check the appropriate marital status and complete the information within the section.

MARRIED

If you choose to start Social Security benefits at full retirement age, should we start the benefits at

- Birthday
- Full Retirement Age (FRA + months as outlined by SSA)

If spouse chooses to start Social Security benefits at full retirement age, should we start the benefits at

- Birthday
- Full Retirement Age (FRA + months as outlined by SSA)

SINGLE*

If you choose to start Social Security benefits at full retirement age, should we start the benefits at

- Birthday
- Full Retirement Age (FRA + months as outlined by SSA)

DIVORCED*

If you choose to start Social Security benefits at full retirement age, should we start the benefits at

- Birthday
- Full Retirement Age (FRA + months as outlined by SSA)

Were you married at least 10 years?

- Yes

Ex-spouse's Birth Date _____ Year of divorce _____ (Required)
mm/dd/yyyy

Ex-spouse's monthly benefit at full retirement age \$ _____

- No (You are not entitled to your ex-spouse's earning records to increase your benefits. We will continue as Single.)

WIDOWED*

If you choose to start Social Security benefits at full retirement age, should we start the benefits at

- Birthday
- Full Retirement Age (FRA + months as outlined by SSA)

Spouse's monthly benefit \$ _____

*Social Security Pro is intended for individuals under 70 and not currently receiving Social Security benefits

Pensions for Earnings Not Covered by Social Security

	Estimated amount of non-covered monthly pension	Monthly Social Security benefit at full retirement age	Monthly retirement benefit from WEP calculator* in today's dollars
Person A	\$	\$	\$
Person B	\$	\$	\$

*<http://www.socialsecurity.gov/planners/retire/anyPiaWepis04.html>

Social Security Benefits

NOT YET FILED

	Monthly Benefit at Full Retirement Age (FRA)	Age to Start Benefits	Live to Age	Rate of Return/Discount Rate	Cost of Living Adjustment
Person A	\$			%	%
Person B	\$				

CURRENTLY RECEIVING SOCIAL SECURITY BENEFITS

	Current Monthly Benefit	Age Benefits Started	Monthly Benefit at Full Retirement Age (FRA)
Person A	\$		\$
Person B	\$		\$

SUSPENDED SOCIAL SECURITY BENEFITS*

Person A Yes No

Person B Yes No

*Only applies if client was born before May 1, 1950 and not already receiving benefits (and age < 70).

Assumptions

	Lives to Age
Person A	
Person B	

RATE OF RETURN/DISCOUNT RATE: _____ (0-8%)

SOCIAL SECURITY COST OF LIVING ADJUSTMENT: _____ (0-6%)

Benefits Statement

Each year, 90 days prior to your client's birthday, the Social Security Administration (SSA) mails their annual Social Security Statement showing reported earnings history as well as estimates of benefit amounts available under the Social Security programs.

Your client doesn't have a benefits statement? No problem. Social Security Statements are available online. Have your clients go to SSA's secure site (<https://secure.ssa.gov/RIL/SiView.do>) and create a "my Social Security" account where they can view and print their Social Security Statement at any time.