

SSAnalyzer Information Form

Current Relationship Status (Select one):

Married

Single

Window

Divorced

Date of Divorce or Death: _____

Estimated Monthly Retirement Spending Budget: \$ _____

Client:

First Name: _____

Last Name: _____

Date of Birth: _____

Estimated Life Expectancy Age: _____

Are you currently taking Social Security? Yes No

Start Date of Collecting Benefits: _____

If yes, Current Monthly Amount: _____

Monthly Primary Insurance Amount: _____
(Estimated Benefit at Full Retirement Age)

Partner:

First Name: _____

Last Name: _____

Date of Birth: _____

Estimated Life Expectancy Age: _____

Are you currently taking Social Security? Yes No

Start Date of Collecting Benefits: _____

If yes, Current Monthly Amount: _____

Monthly Primary Insurance Amount: _____
(Estimated Benefit at Full Retirement Age)

Step to get your "Primary Insurance Amount" (Full Retirement Age Amount on Social Security Statement)

- Visit <https://www.ssa.gov/myaccount/>
- Click on "Create an Account" or "Sign In" if you have already created an account
- To create an account, you will need a valid E-mail address, a Social Security Number, U.S. Mailing Address, and be 18 years of age or older.
- After you Sign In, you can download **Your Social Security Statement**. Print and save (PDF). Bring a hard copy to the meeting. Save for your records.
- Write the estimated "Monthly Retirement Benefit" given for your **Full Retirement Age**, as designated on your statement.

Do you or your partner have a "Non-Covered Pension" i.e., a pension from a job where you did not pay into Social Security? This applies to some federal, police, ministerial, teachers, and other public employees. Yes No

If yes, enter details here:

Client

Partner

Monthly Pension Amount \$ _____

\$ _____

Pension Start Date _____

Pension Growth Rate _____ %

_____ %

If you have a qualifying child(ren):

First Name: _____

First Name: _____

Date of Birth: _____

Date of Birth: _____

High School Graduation Date: _____

High School Graduation Date: _____

Email Address: _____

Phone: _____

(To Send Report)

(If Questions Arise)