



# Solving the Puzzle

Of Social Security Benefit Options , For Retirement Income Planning

## Data Intake Form

Name \_\_\_\_\_ DOB \_\_\_\_\_

SS Benefit \$ \_\_\_\_\_ Monthly benefit at age 66(FRA)

Already taking Social Security Yes \_\_\_ No \_\_\_ If yes, When did you start? \_\_\_\_\_

Use Life Expectancy Table Yes \_\_\_ Or What age/ How Long do you think you will live? \_\_\_\_\_

Retire @ Age: \_\_\_\_\_ 2<sup>nd</sup> Choice: \_\_\_\_\_

Total Monthly Income needed \_\_\_\_\_ 2<sup>nd</sup> Choice: \_\_\_\_\_

Spouse Name \_\_\_\_\_ DOB \_\_\_\_\_

SS Benefit \$ \_\_\_\_\_ Monthly benefit at age 66 (FRA)

**DIVORCED:** Married at least 10 Years. What Year did you divorce? \_\_\_\_\_

Have either of you ever been widowed? Yes \_\_\_ or No \_\_\_

Already taking Social Security? Yes \_\_\_ or No \_\_\_ If yes, When did you start? \_\_\_\_\_

Use Life Expectancy Table: Yes \_\_\_ Or What age/ How long do you think you will live? \_\_\_\_\_

Retire@Age \_\_\_\_\_ 2<sup>nd</sup> Choice \_\_\_\_\_

### RETIREMENT INCOME:

Total Investment Accounts Value ( 401K's, IRA, Brokerage Accounts Etc)

Under \$100K \_\_\_\_\_ \$100k to 500K \_\_\_\_\_ \$500K to 1 million \_\_\_\_\_ Over 1 Million \_\_\_\_\_

Mr., Employers Pension ( incl. spousal benefit). Once retired, expected monthly amount\$ \_\_\_\_\_

Mrs., Employers Pension ( incl. spousal benefit). Once retire, expected monthly amount\$ \_\_\_\_\_

Any / All Other Income . Rental Property Etc. \_\_\_\_\_