Social Security Timing® Intake Form - Married

CLIENT INFORMATION

Name: Date of birth: Life expectancy:

Spouse

Name: Date of birth: Life expectancy:

BENEFITS

			Spouse			
Quick entry	Specified entry	Historical earnings	**Spouse**	Quick entry	Specified entry	Historical earnings

QUICK ENTRY

Statement date: Amount client will receive at full retirement age:

If the client has already elected, complete the following.

Age of initial election: Current gross monthly benefit amount:

Spouse

Statement date: Amount client will receive at full retirement age:

If the client has already elected, complete the following.

Age of initial election: Current gross monthly benefit amount:

SPECIFIED ENTRY

Age at which client will collect retirement benefits: Age   Month

Benefit amount at age entered:

Spouse

Age at which client will collect retirement benefits: Age   Month

Benefit amount at age entered:

HISTORICAL EARNINGS - Social Security statement required for entry

Start work year: Stop work date:

Spouse

Start work year: Stop work date:

Benefit Cut

Year benefit cut occurs: *(Default entry) 2034*   Percentage benefits are cut: *(Default entry) 24%*

　　 Include in Social Security Timing report?

INCOMES

Earned income and non-covered pensions are two types of income that may affect the Social Security benefit amount. If a non-covered pension is listed, the historical work record is required.

Income type: Earned income   Monthly income amount:

　Start date: COLA:

　End type: Date   Age   Owner's Death   End date:

Income type: Non-covered pension   Monthly income amount:

　Start date: COLA:

Spouse

Income type: Earned income   Monthly income amount:

　Start date: COLA:

　End type: Date   Age   Owner's Death   End date:

Income type: Non-covered pension   Monthly income amount:

　Start date: COLA:

INCOME NEEDS

Monthly income need, in today's dollars: Income need after spouses death:

ASSUMPTIONS

Inflation rate: Discount rate: