

Social Security Timing® Intake Form - Single, Widow or Divorced

CLIENT INFORMATION

Name:	Marital status:
Date of birth:	Life expectancy:
If widow/er, deceased	
Date of birth:	Date of death:
If divorced, ex-spouse's	
Date of birth:	Life expectancy:

BENEFITS

Quick entry Specified entry Historical earnings

QUICK ENTRY

Statement date:	Amount client will receive at full retirement age:
<i>If the client has already elected, complete the following.</i>	
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:		

HISTORICAL EARNINGS - Social Security statement required for entry

Start work year:	Stop work date:
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If widow/er, deceased's

Benefit amount you would receive if you elect widow's benefits at your full retirement age:
Primary insurance amount of the deceased:

If divorced, ex-spouse's

Anticipated retirement claim age for the ex-spouse:
Benefit amount you would receive if you elect spousal benefits at your full retirement age: <i>(or soonest available if you are more than 6 years older than your ex-spouse)</i>

Benefit Cut

Year benefit cut occurs: <i>(Default entry) 2034</i>	Percentage benefits are cut: <i>(Default entry) 24%</i>
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:

INCOME NEEDS

Monthly income need, in today's dollars:
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ASSUMPTIONS

Inflation rate:	Discount rate:
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