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

Name: Marital status: Date of birth: Life expectancy: ### Widowler, deceased Date of birth: Date of death: #### Widowler, deceased Date of birth: Date of death: #### Universed, ex-spouse's Date of birth: Life expectancy: #### BREFITS Quick entry Specified entry Historical earnings QUICK ENTRY Statement date: Amount client will receive at full retirement age: ###################################	CLIENT INFORMATION	
If vivlower, deceased Date of birth: Date of death: If divorced, ex-spouse's Date of birth: Life expectancy: BENEFTS		
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 Specified entry Historic	Date of birth:	Life expectancy:
BENEFITS 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: 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: If widowler, deceased's Benefit amount you would receive if you elect widow's benefits at your full retirement age: 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: (or soonest available if you are more than 6 years older than your ex-spouse) Benefit Cut Year benefit cut occurs: (Default entry) 2034 Include in Social Security Timing report? NICOMES 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 Monthly income amount:	If widow/er, deceased	
Date of birth: Life expectancy: BENEFITS	Date of birth:	Date of death:
Current gross monthly benefit amount: SPECIFIED 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: 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: If widowier, 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: (or soonest evaliable if you are more than 6 years older than your ex-spouse) Benefit cut Year benefit cut occurs: (Default entry) 2034 Percentage benefits are cut: (Default entry) 24% Include in Social Security Timing report? NOONIES 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:	If divorced, ex-spouse's	
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: 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: If widowler, 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: (or soonest svaliabile if you are more than 6 years older than your ex-spouse) 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:	Date of birth:	Life expectancy:
Statement date: 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: HISTORICAL EARNINGS - Social Security statement required for entry Start work year: Stop work date: If widowler, 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: (or soonest available if you are more than 6 years older than your ex-spouse) Benefit Cut Year benefit cut occurs: (Default entry) 2034 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 downers.	BENEFITS	
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: HISTORICAL EARNINGS - Social Security statement required for entry Start work year: Stop work date: If widowler, 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: (or soonest available if you are more than 6 years older than your ex-spouse) 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:	Quick entry Specified entry Historical earnings	
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: HISTORICAL EARNINGS - Social Security statement required for entry Start work year: Stop work date: If widowler, 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: (or soonest available if you are more than 6 years older than your ex-spouse) 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:	QUICK ENTRY	
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: HISTORICAL EARNINGS - Social Security statement required for entry Start work year: Stop work date: If widowler, 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: (or soonest available if you are more than 6 years older than your ex-spouse) 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:		Amount client will receive at full retirement age:
Age of initial election: Current gross monthly benefit amount: SPECIFIED ENTRY	If the client has already elected, complete the following.	
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: If widowler, 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: (or soonest available if you are more than 6 years older than your ex-spouse) 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:	Age of initial election:	Current gross monthly benefit amount:
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: If widowler, 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: (or soonest available if you are more than 6 years older than your ex-spouse) 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:	SDECIEIED ENTDY	
Benefit amount at age entered: HISTORICAL EARNINGS - Social Security statement required for entry Start work year: If widowler, 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: [or soonest available if you are more than 6 years older than your ex-spouse] 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:		Month
HISTORICAL EARNINGS - Social Security statement required for entry Start work year: If widowler, 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: (or soonest available if you are more than 6 years older than your ex-spouse) Benefit Cut Year benefit cut occurs: (Default entry) 2034 Percentage benefits are cut: (Default entry) 24% Include in Social Security Timing report? NCOMES 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:		inone:
Start work year: Stop work date: 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: (or soonest available if you are more than 6 years older than your ex-spouse) 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:		
If widowler, 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: (or soonest available if you are more than 6 years older than your ex-spouse) 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:		
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: (or soonest available if you are more than 6 years older than your ex-spouse) 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 work year:	Stop work date:
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: (or soonest available if you are more than 6 years older than your ex-spouse) 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:	<u> </u>	
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: (or soonest available if you are more than 6 years older than your ex-spouse) 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:	Benefit amount you would receive if you elect widow's benefits at you	ur full retirement age:
Anticipated retirement claim age for the ex-spouse: Benefit amount you would receive if you elect spousal benefits at your full retirement age: (or soonest available if you are more than 6 years older than your ex-spouse) 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:	Primary insurance amount of the deceased:	
Anticipated retirement claim age for the ex-spouse: Benefit amount you would receive if you elect spousal benefits at your full retirement age: (or soonest available if you are more than 6 years older than your ex-spouse) 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:	If divorced, ex-spouse's	
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:	-	
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:	Benefit amount you would receive if you elect spousal benefits at you	ur full retirement age:
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:		•
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: COLA: End type: Date Age Owner's Death Income type: Non-covered pension Monthly income amount:	Benefit Cut	
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: COLA: End type: Date Age Owner's Death End date: Income type: Non-covered pension Monthly income amount:	Year benefit cut occurs: (Default entry) 2034	Percentage benefits are cut: (Default entry) 24%
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: COLA: End type: Date Age Owner's Death End date: Income type: Non-covered pension Monthly income amount:	Include in Social Security Timing report?	
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: COLA: End type: Date Age Owner's Death End date: Income type: Non-covered pension Monthly income amount:	INCOMES	
Income type: Earned income Start date: End type: Date Age Owner's Death Income type: Non-covered pension Monthly income amount: COLA: End date: Monthly income amount:		fect the Social Security benefit amount. If a non-covered pension is listed, the
Start date: COLA: End type: Date Age Owner's Death End date: Income type: Non-covered pension Monthly income amount:	historical work record is required.	
End type: Date Age Owner's Death End date: Income type: Non-covered pension Monthly income amount:	Income type: Earned income	•
Income type: Non-covered pension Monthly income amount:	Start date:	COLA:
· · · · · · · · · · · · · · · · · · ·	End type: Date Age Owner's Death	End date:
Start date: COLA:	Income type: Non-covered pension	Monthly income amount:
	Start date:	COLA:

Discount rate:

INCOME NEEDS

ASSUMPTIONS Inflation rate:

Monthly income need, in today's dollars: