

Sections that are grayed out are not used in this sample case.

Social Security Survivor Sample Case

CLIENT INFORMATION

Name: Sam Survivor Marital status: Widow

Date of birth: 1/2/1962 Life expectancy: 95

If widow/er, deceased

Date of birth: 1/2/1958 Date of death: 2/1/2021

If divorced, ex-spouse's

Date of birth: Life expectancy:

BENEFITS

Quick entry Specified entry Historical earnings

QUICK ENTRY

Statement date: 4/21/2022 Amount client will receive at full retirement age: \$2,000

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 widow/er, deceased's

Benefit amount you would receive if you elect widow's benefits at your full retirement age: \$2,000

Primary insurance amount of the deceased: \$2,000

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 2034 Percentage benefits are cut: (Default entry) 24% 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:

INCOME NEEDS

Monthly income need, in today's dollars:

ASSUMPTIONS

Inflation rate: 2.4% Discount rate: 4