

Social Security Maximizer Questionnaire

By completing the following questionnaire we will approximate the “Earliest Possible” and the “Maximum” Social Security Strategies

His Name _____ Her Name _____

Street Address _____ City: _____

State _____ ZIP _____ Email _____

His Birth Date ____/____/____ Her Birth Date ____/____/____

His Marital Status (Check all that apply) Married __, Divorced __, Widowed __, Single __, Seperated __, Domestic Partner __

Her Marital Status (Check all that apply) Married __, Divorced __, Widowed __, Single __, Seperated __, Domestic Partner __

His Employment Status (Check box) Employed __, Retired __, Business Owner __, Not employed __, Homemaker __

Her Employment Status (Check box) Employed __, Retired __, Business Owner __, Not employed __, Homemaker __

His Estimated Life Expectancy _____ If left blank, we will use the age and sex in the 2006 Social Security Cohort Life Table

Her Estimated Life Expectancy _____ If left blank, we will use the age and sex in the 2006 Social Security Cohort Life Table

Has He already Elected Social Security? Yes _____ No _____

Has She already Elected Social Security? Yes _____ No _____

Does He have a pension from work not covered under social security? Yes _____ No _____

Does She have a pension from work not covered under social security? Yes _____ No _____

How should we estimate benefits for the client? _____ Using the Client’s estimated benefits from the SS Statement? (Quickest)
_____ Using the Client’s earnings record from the SS Statement? (Most Accurate)

What is the Social Security Statement Date (His)? ____/____/____

How much will He receive at Full Retirement Age (FRA) as listed on the statement? _____

At What age will He stop working? (Check one) <61 __, 62 __, 63 __, 64 __, 65 __, 66 __, 67 __, 68+ __

What is His anticipated annual income for the client (after 62)? _____

What is the Social Security Statement Date (Hers)? ____/____/____

How much will She receive at Full Retirement Age (FRA) as listed on the statement? _____

At What age will She stop working? (Check one) <61 __, 62 __, 63 __, 64 __, 65 __, 66 __, 67 __, 68+ __

What is Her anticipated annual income for the client (after 62)? _____

What is the desired monthly Pre-Tax household income upon retirement? _____

What is the desired monthly Pre-Tax household income after first death? _____