

MAXIMIZING YOUR SOCIAL SECURITY RETIREMENT BENEFITS

Take the first step toward developing your individual plan for electing to draw benefits
by completing this information and gathering relevant documents.

CONTACT INFORMATION

Your name _____ Spouse's name _____

Email address _____ Phone number _____

SOCIAL SECURITY INFORMATION

Your birth month/year _____ Spouse's birth month/year _____

Your earned income in 2012 _____ Spouse's earned income in 2012 _____

	AGE 62 OR YOUNGER	BETWEEN AGES 62 AND 67	AGE 67 OR LATER	NOT CURRENTLY WORKING
At what age do you plan to stop working?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
At what age does your spouse plan to stop working?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	YOU		YOUR SPOUSE	
	YES	NO	YES	NO
Have you or your current spouse been married before?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If so, did at least one previous marriage last 10 years or longer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you reviewed your most recent Social Security statement for accuracy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DOCUMENTS

Please bring these documents, for both you and your spouse (if applicable), to our next meeting:

Most recent Social Security statement Most recent tax return Most recent pay statement from employer

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER
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