



SOCIAL SECURITY FACT FINDER

ABOUT YOU

Legal Name: _____ Spouse Legal Name: _____

Date of Birth: _____ Date of Birth: _____

Self

Spouse

Current Marital Status: Single Married
Previous Marital Status: Divorced Widowed Divorced Widowed

What is your Life Expectancy? _____ Use average _____ Use average

YOUR EARNINGS AND RETIREMENT INCOME ASSUMPTIONS

Are you currently collecting SS benefits? Yes No Yes No

If yes, what is the monthly amount? \$ _____ \$ _____

Current Employment Income: \$ _____ \$ _____

At what age do you plan to stop working? _____

Employment income after age 62? \$ _____ \$ _____

Your estimated SS benefits at full retirement age? \$ _____ \$ _____

Do you have a pension from employment in which you did NOT pay Social Security Taxes? Yes No Yes No

If yes, what was the monthly amount? \$ _____ \$ _____

When does the pension start? _____

Cost of living adjustment? _____ % _____ %

**If you are, or have been divorced or widowed, please continue and complete page 2*

To access your Social Security statement, create an account online at ssa.gov/myaccount

IF YOU'RE WIDOWED -

If eligible for survivor benefits, you will need proof of marriage and death when you visit your local SSA office.

Deceased spouse's date of birth: _____

How long were you married? _____ years _____ months

What monthly benefit amount would you receive if you select widow/widower's benefit at full retirement age? \$ _____

What was the primary insurance amount (PIA) of your deceased spouse? \$ _____

IF YOU'RE DIVORCED -

You may be eligible for benefits if you were married for at least 10 years. You will need proof of marriage and divorce when you visit your local SSA office.

Ex-spouse's date of birth: _____

How long were you married? _____ years _____ months

At what age does your ex-spouse plan to claim benefits? _____

What monthly benefit amount would you receive if you select spousal benefit at full retirement age? \$ _____

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