

Social Security Checklist

Client Name:

Client	
Checklist	Item
	<ul style="list-style-type: none"> • Please provide us with a recent Social Security Statement (all pages) or current benefit statement
	<ul style="list-style-type: none"> • Have you ever worked in a non-Social Security job(s)? (where Social Security taxes were not deducted from your paycheck) Y/N • If yes, name of employer/years worked/pension amount/when entitled to pension/amount or percent of any expected cost of living increase (COLA):
	<ul style="list-style-type: none"> • Are you receiving Social Security benefits now? Y/N • Did you file a restricted application to receive Spousal benefits only in order to receive delayed credits on your own benefit? Y/N • Or, have you filed and suspended Social Security benefits? Y/N • If the answer to any of the above three questions are Yes, please provide the date you filed:
	<ul style="list-style-type: none"> • Still working? Y/N Expected annual gross income from work until retirement:
	<ul style="list-style-type: none"> • Expected date of retirement:
	<ul style="list-style-type: none"> • Names and birthdates of minor children living at home: • Any children over age 18 disabled as defined by Social Security?
	<ul style="list-style-type: none"> • If single, and previously married ten or more years or if previous spouse is deceased, please provide the following information: <ol style="list-style-type: none"> 1) Widow(er)'s benefit or your divorced spouse's benefit gross monthly estimate at your full retirement age (obtain from Social Security) 2) Did your former spouse ever work in a non-Social Security job? 3) If so, employer/years worked/pension amount/when entitled to pension (if known) or estimate if not known: 4) Ex-spouses date of birth: 5) Ex-spouses date of death:

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Spouse Name:

Spouse	
Checklist	Item
	<ul style="list-style-type: none"> • Please provide us with a recent Social Security Statement (all pages) or current benefit statement
	<ul style="list-style-type: none"> • Have you ever worked in a non-Social Security job(s)? (where Social Security taxes were not deducted from your paycheck) Y/N • If yes, name of employer/years worked/pension amount/when entitled to pension/amount or percent of any expected cost of living increase (COLA):
	<ul style="list-style-type: none"> • Are you receiving Social Security benefits now? Y/N • Did you file a restricted application to receive Spousal benefits only in order to receive delayed credits on your own benefit? Y/N • Or, have you filed and suspended Social Security benefits? Y/N • If the answer to any of the above three questions are Yes, please provide the date you filed:
	<ul style="list-style-type: none"> • Still working? Y/N Expected annual gross income from work until retirement:
	<ul style="list-style-type: none"> • Expected date of retirement:
	<ul style="list-style-type: none"> • Names and birthdates of minor children living at home: • Any children over age 18 disabled as defined by Social Security?
	<ul style="list-style-type: none"> • If single, and previously married ten or more years or if previous spouse is deceased, please provide the following information: <ol style="list-style-type: none"> 6) Widow(er)'s benefit or your divorced spouse's benefit gross monthly estimate at your full retirement age (obtain from Social Security) 7) Did your former spouse ever work in a non-Social Security job? 8) If so, employer/years worked/pension amount/when entitled to pension (if known) or estimate if not known: 9) Ex-spouses date of birth: 10) Ex-spouses date of death: