

## Social Security Checklist & Instructions

**Name(s):**

**Date:**

Please answer all questions below, writing n/a if not applicable

Item	Client	Spouse
1. Have you ever worked in a non-Social Security job(s) where Social Security taxes were not deducted from your paycheck?		
2. Are you receiving Social Security retirement benefits now?		
3. If so, when did you file?		
4. Have you or your spouse filed a restricted application for spousal only benefits?		
5. If so, when did you file?		
6. Are you still working?		
7. If so, please estimate your gross annual income from work until retirement:		
8. Expected date of retirement:		
9. Names and birthdates of children under 19 or still in high school:		
10. Children permanently disabled before age 22:		
11. Any prior marriages?		
12. If so, date of marriage:		
13. Date of divorce: <ul style="list-style-type: none"> <li>• Your estimated gross monthly spousal benefit at full retirement age (Social Security can provide you with this information):</li> </ul>		
14. Or if your former spouse is deceased: <ul style="list-style-type: none"> <li>• Date of birth of spouse:</li> <li>• Year of death of spouse:</li> <li>• Last year spouse earned wages:</li> <li>• Your estimated gross monthly widower benefit at full retirement age (Social Security can provide you with this information):</li> </ul>		

## Instructions:

Please provide us with a recent Social Security Statement (**all pages**) or current benefit statement for you and your spouse (when applicable). You can download a pdf from [ssa.gov](https://ssa.gov).

- We need all of your earnings history to review your Social Security filing options. Therefore, if your statement combines multiples years of earnings like this:

**Earnings Record**  
Review your earnings history below to ensure it is accurate. This is important because we base your future benefits on our record of your earnings. We have combined your earlier years of earnings, but you can view them online with my Social Security. **If you find an error**, let us know by visiting [myaccount.socialsecurity.gov](https://myaccount.socialsecurity.gov) or calling 1-800-772-1213.

Work Year	Earnings Taxed for Social Security	Earnings Taxed for Medicare (began 1966)
1981-1990	\$7,330	\$7,330
1993	\$10,238	\$10,266
1994	\$17,587	\$17,587

Then, please see the instructions below for viewing, copying and pasting your income history to a word document to provide to us.

- Click on review your full earnings record now as shown below:

The screenshot shows the 'my Social Security' website. At the top, there are navigation links for Home, Messages, Preferences, and Security Settings. Below that, a welcome message is displayed. The main content area includes several links: 'Print / Save a copy of your Social Security Statement (PDF)', 'Retirement Ready: Fact Sheet For Workers Ages 49-60', 'Replace your Social Security Card', and 'Print / Save a letter proving you do not receive benefits (PDF)'. The 'Eligibility and Earnings' section is expanded, showing a progress bar for 40 work credits and a question about earnings in 2020. A yellow button labeled 'Review your full earnings record now' is highlighted with a black arrow pointing to it.

- You will see your earnings history.
- Using your cursor, highlight all of your earnings history like this:

- ▼ Review your earnings record carefully.
- ▼ Limits on Taxable Earnings for Social Security
- ▼ Why would earnings be missing from my record?

**i** See something that doesn't match with your records? If there's a mismatch between your records and the earnings listed, contact us to request a correction.

Work Year	Taxed Social Security Earnings	Taxed Medicare Earnings
2013	\$80,094	\$80,094
2012	\$73,728	\$73,728
2011	\$74,596	\$74,596
2010	\$68,577	\$68,577
2009	\$63,349	\$63,349
2008	\$59,644	\$59,644

- Copy and paste your entire earnings history into Word or Excel. Save it and provide us with a copy.