

Social Security Maximization

Data Intake Form



Client		Spouse	
First & Last Name _____		First & Last Name _____	
DOB _____	Gender _____	DOB _____	Gender _____
SS Primary Insurance Amount (at Full Retirement Age) \$ _____		SS Primary Insurance Amount (at Full Retirement Age) \$ _____	
Already Taking SS? Y ☐ N ☐ SSDI ☐	If Yes, When Did You Start? _____ / _____ MM/YYYY	Already Taking SS? Y ☐ N ☐ SSDI ☐	If Yes, When Did You Start? _____ / _____ MM/YYYY
Use Life Expectancy Table? ☐	or Specify Life Expectancy Age: _____	Use Life Expectancy Table? ☐	or Specify Life Expectancy Age: _____
Annual Salary \$ _____	Age You Would Like to Retire? _____	Annual Salary \$ _____	Age You Would Like to Retire? _____

Other Sources of Income

Assumed COLA _____

- Amount \$ _____ Start Age _____ Client/Spouse *Type of Income _____
- Amount \$ _____ Start Age _____ Client/Spouse *Type of Income _____
- Amount \$ _____ Start Age _____ Client/Spouse *Type of Income _____

*If you receive a pension from employment in which you did not pay Social Security taxes, your benefits may be reduced by the Windfall Elimination Provision (WEP) and/or the Government Pension Offset (GPO). You must provide your full SS statement with earnings history to calculate the estimated WEP and GPO reductions. PIA and earnings history may be obtained online at www.ssa.gov.

Divorced ☐ or Widowed ☐ Spouse/Ex-Spouse DOB _____

Spouse/Ex-Spouse Primary Insurance Amount \$ _____

Spousal/Survivor Benefit amount you would receive at your full retirement age \$ _____

If you do not have this information, it can be obtained from your local SSA office. They may require proof of marriage as well as proof of divorce/death.

How to fill the Income Gap – Do you want to use the *recommended* SS strategy? Y ☐ N ☐

☆Monthly Income Desired? \$ _____

☆Starting in Year _____

Additional Information:

Agent Name: _____

Date: _____

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