

SOCIAL SECURITY SOLUTIONS DATA SHEET

FINANCIAL PLANNER, Kinley Wong, CRPC



COMPLIMENTARY SOCIAL SECURITY BENEFITS ANALYSIS AND STRATEGY

To receive your **Complimentary Social Security Benefits Analysis and Strategy**, please complete **all** sections below. This information will remain confidential and is intended for Social Security Analysis purposes only.

CLIENT INFORMATION

First Name: _____ Middle: _____ Last Name: _____

Date of Birth: ___ / ___ / ___ Gender: Male Female Life Expectancy (estimate) _____

Marital Status: Single Married Widowed Divorced (provide length of marriage) _____

Estimate Benefits Amount or (PIA-Primary Insurance Amount) \$_____ (monthly)

(Note: If you are unclear how to retrieve your Social Security "Estimated Benefits Amount"/(PIA), visit the Social Security Administration website at; www.socialsecurity.gov. Once at the website you can either, a) sign into your existing account by entering your user name and password, or, b) create a new account by creating a new user name and new password. Once inside your account, you should be directed to "My Home" tab. On this page you will see a section named "Social Security Statement". Under this section, click the "View Estimated Benefits" button. You will then see your monthly Estimated Benefits Amount.)

SPOUSE INFORMATION

First Name: _____ Middle: _____ Last Name: _____

Date of Birth: ___ / ___ / ___ Gender: Male Female Life Expectancy (estimate) _____

Estimate Benefits Amount or (PIA-Primary Insurance Amount) \$_____ (monthly)

IMPORTANT INFORMATION

Current Social Security Benefits Filing Status: (check one)

- Client is currently collecting benefits Spouse is currently collecting benefits Neither spouse is collecting benefits

Combined Information: Annual Spending Needs _____

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