

## Social Security Checklist

Name:

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

Name:

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