

CLIENT CHECKLIST/QUESTIONNAIRE

Social Security Planning Supplement

Personal

Name:	Spouse's Name:
Address:	Address:
DOB:	DOB:
Current Age:	Current Age:
Date of Current Marriage:	Date of Current Marriage:
Place of Current Marriage:	Place of Current Marriage:
Previous Spouse/ Length of Marriage:	Previous Spouse/ Length of Marriage:
Children's Ages:	Children's Ages:
Are you or is any child disabled?	Are you or any is child disabled?
If yes, provide details on page 3 "Notes"	If yes, please details on page 3 "Notes"

Desired Monthly Income Goal: _____

Work History

Currently Employed: Y/N	Currently Employed: Y/N
If yes, years until retirement:	If yes, years until retirement:
Monthly income from work:	Monthly income from work:
Collecting SS Benefits: Y/N	Collecting SS Benefits: Y/N Date Began:
Date Benefits Began:	Date Benefits Began:
PIA:	PIA:
Collecting a pension: Y/N	Collecting a pension: Y/N
Amount of Pension:	Amount of Pension:
Public or Private pension:	Public or Private pension:
Survivor benefit on pension: Y/N	Survivor benefit on pension: Y/N
If yes, amount:	If yes, amount:

General Questions:

1. How concerned are you about being able to maintain your current lifestyle in retirement?
Not Concerned Concerned Very Concerned

2. What is the most important financial issue you foresee in retirement?

3. At what age do you intend to stop working fulltime? _____
If you plan to continue working in some capacity, please identify the work/hours:

What caused you to consider this option?

4. Based on your current medical history and that of your family, do you expect a:

- ___ Shorter than average life expectancy
___ Average life expectancy
___ Longer than average life expectancy

5. From an accounting perspective, which of these options best suits your income needs

- ___ It is more important to collect a benefit today, regardless of whether or not it is a reduced amount
OR
___ Insuring that you'll have enough money throughout your lifetime

6. How important is the amount of Social Security survivor benefit to your overall retirement income plan?

7. How important is leaving a legacy for your children or grandchildren to your overall retirement plan?