



Leading Small Business and Individuals to Success

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Social Security Planning Client Starter Page

Your Name: _____ **Date of Birth:** _____

Were you ever married to someone other than your current spouse for ≥ 10 years? Yes ___ No ___

Will you have a minor child at the time of your retirement? Yes ___ No ___

If yes, provide: birthdate ___/___/___ and expected graduation date ___/___/___

Have you begun receiving benefits? Yes ___ No ___

If yes, provide: start date ___/___/___ and current monthly benefits \$ _____

Will you be receiving a pension from a non-social security system like PERS or STRS? Yes ___ No ___

If yes, provide: start date ___/___/___, current monthly benefit \$ _____ and growth rate _____

What is your best estimate of how long you will live? _____

What will you be earning between now and retirement? \$ _____

Spouse Name: _____ **Date of Birth:** _____

Were you ever married to someone other than your current spouse for ≥ 10 years? Yes ___ No ___

Will you have a minor child at the time of your retirement? Yes ___ No ___

If yes, provide: birthdate ___/___/___ and expected graduation date ___/___/___

Have you begun receiving benefits? Yes ___ No ___

If yes, provide: start date ___/___/___ and current monthly benefits \$ _____

Will you be receiving a pension from a non-social security system like PERS or STRS? Yes ___ No ___

If yes, provide: start date ___/___/___, current monthly benefit \$ _____ and growth rate _____

What is your best estimate of how long you will live? _____

What will you be earning between now and retirement? \$ _____

Please provide the following:

Most current federal tax return

Current net worth statement (list of what you own and what you owe)

Current budget (list of monthly income and expense)

How much will you need in retirement? \$ _____ per month.

Please provide current social security statements by doing the following:

Go to the official website of the U.S. Social Security Administration at www.ssa.gov

- Click on the "Sign In" tab in the upper right corner.
- Click on "Create An Account" at the bottom left of the page.
- Review the "Terms of Service" and click on the box next to "I agree to the Terms of Service". Click on "Next"
- Verify Your Identity: Fill in the requested information and click "Next"
- Secure Your Identity: Fill in the requested information and click "Next" (This step is optional. You can go back and do it later.)

Once you have completed registration, the website will require you to log in with the information just submitted.

- From the "My Home" tab after you have logged in, go to the bottom of the screen and click on the link, "Print/Save Your Full Statement".
- Click on this link to open a PDF file of your Social Security earnings history.
- From the "File" menu at the top of the new window, select "Save as" and name the file.
- Email this PDF file to dave@cpaagi.com.