

SOCIAL SECURITY CHECKLIST

Date: _____

At age 60, I expect to live until: **Men** 81.5 years old **Women** 84.5 years old

At age 65, I expect to live until: **Men** 82.7 years old **Women** 85.3 years old

At age 70, I expect to live until: **Men** 84.2 years old **Women** 86.5 years old

Full Name: _____

Relationship Status: _____ Single _____ Married _____ Widowed _____ Divorced

Date of Birth: _____ Life Span: _____

Primary Insurance Amount (PIA): \$ _____ Sex: _____ Male _____ Female

Non-Covered Pension: _____ Yes _____ No

If yes, Monthly Pension Amount? Pension Start Date? Pension Growth Rate?

Monthly Pension Amount: \$ _____ Pension Start Date: _____

Pension Growth Rate: _____

IF MARRIED:

Spouse Full Name: _____

Spouse Date of Birth: _____ Spouse Life Span: _____

Primary Insurance Amount (PIA): \$ _____ Sex: _____ Male _____ Female

Non-Covered Pension: : _____ Yes _____ No

If yes, Monthly Pension Amount? Pension Start Date? Pension Growth Rate?

Monthly Pension Amount: \$ _____ Pension Start Date: _____

Pension Growth Rate: _____

Any children under 18 year old: _____ Yes _____ No

If yes, Full Name(s), Date of Birth, Expected Graduation Date(s):

Full Name: _____

Date of Birth: _____ Expected Graduation Date: _____

Full Name: _____

Date of Birth: _____ Expected Graduation Date: _____

Full Name: _____

Date of Birth: _____ Expected Graduation Date: _____

Full Name: _____

Date of Birth: _____ **Expected Graduation Date:** _____

IF WIDOWED:

Late Spouse Full Name: _____

Late Spouse Date of Birth: _____ **Late Spouse Life Span:** _____

Primary Insurance Amount (PIA): \$ _____ **Sex:** _____ Male _____ Female

Non-Covered Pension: : _____ Yes _____ No

If yes, Monthly Pension Amount? Pension Start Date? Pension Growth Rate?

Monthly Pension Amount: \$ _____ **Pension Start Date:** _____

Pension Growth Rate: _____

IF DIVORCED:

Ex-Spouse Full Name: _____

Ex-Spouse Date of Birth: _____ **Ex-Spouse Life Span:** _____

Primary Insurance Amount (PIA): \$ _____ **Sex:** _____ Male _____ Female

Non-Covered Pension: : _____ Yes _____ No

If yes, Monthly Pension Amount? Pension Start Date? Pension Growth Rate?

Monthly Pension Amount: \$ _____ **Pension Start Date:** _____

Pension Growth Rate: _____

For your information:

In order to return a strategy for a divorced client, you will need the Primary Insurance Amount for both your client and the former spouse. Information about the client's former spouse will not be provided by the Social Security Administration, including the Primary Insurance Amount. The client must be able to retrieve the information from either the former spouse or a Social Security Statement. For a divorced client, the Social Security Analyzer requires the following conditions be met:

- The client must have been married for at least 10 years. To be eligible for a divorced spouse benefit, the marriage must have lasted for a minimum of 10 years.
- The client must not be currently married. If the client is now married, he or she is not eligible for a divorced spouse benefit.

In addition, to receive a divorced spouse benefit:

- The client must be at least 62 years of age.
- The divorced spouse benefit he or she might be eligible to receive must be greater than any retirement benefit the client would receive on his or her own earnings record.
- The ex-spouse must have filed for benefits.

If the former spouse has not applied for benefits but he or she is at least age 62 and eligible for benefits, the client may still be eligible for a divorced spouse.