

Social Security Timing Report

Name _____

Marital Status _____

Year of birth for largest benefit recipient or if you are single _____

Year of birth for secondary benefit recipient or deceased spouse _____

Social Security income at full retirement age for largest benefit (e.g. 66) \$ _____

Secondary Social Security income at full retirement age (e.g. 66) \$ _____

What is the Social Security (estimate if you do not know) benefit of your ex-spouse if you were married more than 10 years and divorced more than two? \$ _____

Date of Death of spouse if widowed _____

At what age would you like to retire? _____

How much do you need every month for retirement income? \$ _____

(if you do not know how much you need use your current take home pay subtract any money you are saving for retirement to know your approximate net income need). You can also use the attached budget worksheet.

Please provide details on any pension(s) you have: _____

Approximately how much have you saved for retirement? \$ _____

Do you still have a mortgage? _____

Other Notes: