# Social Security Maximization
## Data Intake Form

☆ ☆ ☆ ☆ ☆

| Client | Spouse |
|---|---|
| First & Last Names | First & Last Names |

| | | |
|---|---|---|
| **DOB** | Gender | **DOB** | Gender |

| SS Primary Insurance Amount (at Full Retirement Age) | $ | SS Primary Insurance Amount (at Full Retirement Age) | $ |
|---|---|---|---|

| Already Taking SS? **Y / N** | If Yes, when did you start? _____ / _____ MM/YYYY | Already Taking SS? **Y / N** | If Yes, when did you start? _____ / _____ MM/YYYY |
|---|---|---|---|

| Use Life Expectancy Table? ☐ | or | Specify Life Expectancy Age: | Use Life Expectancy Table? ☐ | or | Specify Life Expectancy Age: |
|---|---|---|---|---|---|

| Annual Salary $ | Age you would like to retire? | Annual Salary $ | Age you would like to retire? |
|---|---|---|---|

I would like to see these reports:                                                    COLA_____%

☐   Social Security Taxation – Adjusted Gross Income in Retirement $_____ *(Not including SS)*

Portion that is interest? _____ %        Portion that is dividends? _____%

☐   Working in Retirement – How will working *and* collecting SS affect my benefit?

☐   Individual Breakeven Analysis

☐   How to fill the Income Gap – Do you want to use the *recommended* SS strategy?   **Y / N**

☆Monthly income desired?        $                        ☆Start Income at Client / Spouse Age:

☆Other Income        $                        ☆Type of Income?

☆Client / Spouse?        ☆Start Age:        ☆End Age

☆Other Income        $                        ☆Type of Income?

☆Client / Spouse?        ☆Start Age:        ☆End Age

Additional Information:

_____

_____

_____

Agent Name:                                        Date: