

SAVVY SOCIAL SECURITY

Client Questionnaire – Single Individuals

Client name:

Date of birth:/...../..... Age on nearest birthday:

Primary insurance amount (PIA): \$.....

Life Expectancy:

Still working? Yes No

Annual income from work: \$..... Expected date of retirement:

Amount of desired retirement income: \$.....

Former Marriages

Date of former marriage:/...../..... Date marriage ended:/...../.....

Total number of years married:

Reason marriage ended: Death Divorce

If divorce, is ex-spouse still alive?: Yes No

Date of former marriage:/...../..... Date marriage ended/...../.....

Total number of years married:

Reason marriage ended: Death Divorce

If divorce, is ex-spouse still alive?: Yes No

Minor children at home? (or adult child disabled before age 22)? Yes No

Name: Age:

Name: Age:

Adjusted gross income from latest tax return: \$.....

Current Income

Work: \$..... Pensions: \$..... Investments: \$.....

Other: \$..... Total income: \$.....

Assets

Retirement accounts: \$.....

Savings and investment accounts: \$.....

Real estate not including home: \$.....

Other: \$.....

Total Assets: \$.....

Ever worked in a non-Social Security covered job?

Husband: Yes No / Wife: Yes No

If yes:

Name of employer:

Amount of pension: \$..... When entitled to pension:

Also worked in covered job? Yes No

Number of years worked: