

SAVVY SOCIAL SECURITY

Client Questionnaire – Married Couples

Client Name:

Husband:

Wife:

Date of birth:

Husband:/...../..... Wife:/...../.....

Age on nearest birthday:

Husband:/...../..... Wife:/...../.....

Primary insurance amount (PIA)

Husband: \$..... Wife: \$.....

Life expectancy:

Husband:
(default 85) Wife:
(default 95)

Still working?

Husband: Yes No

Annual income from work: \$.....

Wife: Yes No

Annual income from work: \$.....

Expected date of retirement:

Husband:/...../..... Wife:/...../.....

Amount of desired retirement income: \$..... (joint)

Date of this marriage: / /

Former Marriages:

Husband:

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

Wife:

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 (joint)
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: