

Name: _____ **Date of Birth:** _____

Estimated Social Security benefits for age:

62 _____ FULL RETIREMENT AGE _____ 70 _____

If receiving benefits, what is your current benefit amount before deductions: _____

When did you receive your first payment: _____

Currently married: Yes No **Date of Current Marriage:** _____

Previous Marriage Information:

Name of Ex-Spouse	Date of Marriage	Date of Divorce	Date of Death

Points to Consider:

- Spouse's Benefit: minimum 1 year duration of marriage
- Divorced Spouse's Benefits: 10 year duration of marriage and not currently married.
- Widow's Benefits: Minimum 9 month duration of marriage and living with at the time of death or mother of a child of the deceased and not currently married or remarriage occurs after age 60.
- Surviving Divorced Widow's Benefits: 10 year duration of marriage requirement and not currently married or remarriage occurs after age 60.
- Earliest potential entitlement to a widow/widower's benefit is age 60 if reduced wages or no work is involved.

Are there children under the age of 18 or under the age of 19 and still in high school? Yes No

Do you have a child who became disabled before age 22? Yes No

Current work plans? Estimated yearly wages: _____ **Planned work stop date:** ____

Do you own your own business? Yes No

Are you a member of a corporation? Yes No

Are you entitled to a government pension based on work not covered under Social Security?

If yes, fill out **NON-COVERED GOVERNMENT PENSION** or any **NON-COVERED pension** on page 2.



NON-COVERED GOVERNMENT PENSION or any NON-COVERED pension:

Did you pay into Social Security and a NON-COVERED government pension (employment where you DID NOT pay Social Security taxes) or teacher retirement system (TRS) concurrently in your job position? If so, WEP and GPO do not apply. Yes No

If your work was covered under a government pension (non-covered SS wages) exclusively, please indicate how many years you were employed? _____

What is the Standard Annuity amount for the government pension? _____