

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 _____	Wife _____
	(default 85)	(default 95)

Still working?

Husband: Y N Annual income from work \$ _____

Wife: Y N 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? Y N

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? Y N

Minor children at home (or adult child disabled before age 22)? Y N

 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 Y N Wife Y N

 If yes:

 Name of employer _____

 Amount of pension \$ _____ When entitled to pension _____

 Also worked in covered job? Y N Number of years worked _____