

Savvy Social Security
Client Questionnaire – Single Individuals

Client name: _____

Date of birth _____

Age on nearest birthday _____

Primary insurance amount (PIA) \$ _____

Life expectancy _____

Still working? Y N 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? Y N

 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

 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? Y N

 If yes:

 Name of employer _____ Number of years worked _____

 Amount of pension \$ _____ When entitled to pension _____

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