

Name: _____ Date of Birth: _____

Estimated Social Security benefits for age:

62 _____ 66 (or full retirement age) _____ 70 _____

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 pension based on wages where you DID NOT pay SS taxes on those wages?

Examples include:

- A government pension, US or otherwise,
- A private pension, based on work where your employer did not withhold SS taxes
- A pension where your employer opted out of SS.

Yes No

If **YES**, your SS benefits may be subject to the Windfall Elimination Provision and/or Government Pension Offset. Please answer the questions below.

What is your pension amount based on the wages you did not pay SS taxes? _____

When did you become entitled to this pension? _____

Please have a copy of your statement of earnings from your personal SS statement available.