Married Couples Intake Form

Client 1

Full Name			DOB	DOB Gender			Age of Death		
If Already Elected: Current Benefit				nt		Benefit S	Benefit Start Date		
If Pension from non-social security covered earnings:									
						Pension St	Pension Start Date		
Benefit Calculation Options: (Pension Cases require option A)									
A. Earnings History: OBTAIN COPY OF CLIENTS EARNINGS HISTORY (MOST ACCURATE)									
Last year's taxed social security earnings									
Hypothetical Future Earnings									
	Year	Earnings	Year	Earnings	Year	Earnings	Year	Earnings	
	2013	Lamings	2018	Lamings	2023	Lamings	2028	Lamings	
	2014		2019		2024		2029		
	2015		2020		2025		2030		
	2016		2021		2026		2031		
	2017		2022		2027		2031		
Benefit Estimate: Estimate at age in which client plans to stop working. Benefit Age Benefit Estimate Estimate Date									
Client 2									
Full Name DOB Gender Age of Death									
						_			
If Already Elected: Current Benefit Amount Benefit Start Date									
If Pension from non-social security covered earnings: Monthly Pension Amount: Pension COLA						Pension St	Pension Start Date		
Benefit Calculation Options: (Pension Cases require option A)									
A. Earnings History: OBTAIN COPY OF CLIENTS EARNINGS HISTORY (MOST ACCURATE)									
Last year's taxed social security earnings									
		T		othetical Fut			T		
	Year	Earnings	Year	Earnings	Year	Earnings	Year	Earnings	
	2013	1	2018	1	2023		2028	 	
	2014 2015		2019 2020	1	2024 2025		2029 2030	+	
	2015		2020		2025		2030		
	2010		2021		2020		2031		
	2017	ı	2022		2027				
B. Benefit Estimate: Estimate at age in which client plans to stop working.									
Benefit Age Benefit Estimate Estimate Date									
Assun	nptions:	Inflation Rate 0			0	2.8% 3.8% Other			
_		Real Long Term Rate of Return			0	1.0%		er	
Income Goals: What is the desired monthly income upon retirement?									
What is the desired monthly income after first spouse passes?									