



Social Security / Retirement Income Strategy Questionnaire

For many retirees, Social Security represents a portion of the income they will rely on during retirement. That's why it's important to carefully consider not only when to claim Social Security benefits, but also how to incorporate your unique circumstances, challenges, and goals into this decision. Working with a financial professional who can help you identify potential obstacles, or even uncover opportunities to enhance your current retirement income strategy, is a step toward creating an informed and empowered retirement. Please complete the questionnaire below for you and your spouse, if applicable, to begin the process.

Tell Us About You

Name: _____

Date of birth: _____

Still working? Yes No

If yes, annual earnings: _____

Planned retirement age: _____

Spouse's Name: _____

Date of birth: _____

Still working? Yes No

If yes, annual earnings: _____

Planned retirement age: _____

Social Security Benefits

Currently collecting Social Security? Yes No

If yes, amount of monthly benefit: _____

At what age did payments begin? _____

If No, estimated benefit at full retirement age*: _____

Desired age to claim benefit: _____

*Please provide copy of Social Security earnings statement

Currently collecting Social Security? Yes No

If yes, amount of monthly benefit: _____

At what age did payments begin? _____

If No, estimated benefit at full retirement age*: _____

Desired age to claim benefit: _____

*Please provide copy of Social Security earnings statement

Not affiliated with the Social Security Administration or any government agency. Any information provided will be used to determine recommendations for you by a financial professional. This may include the sale of life insurance and/or annuity products. Insurance and annuity products are backed by the financial strength and claims-paying ability of the issuing company. Insurance and annuity products offer optional benefits and riders which may involve additional cost.

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Government Benefits* (if no, skip section)

Eligible for a government pension? Yes No

Government employer: _____

Amount of government pension: _____

Commencement date: _____

*Please provide copy of Social Security earnings statement

Eligible for a government pension? Yes No

Government employer: _____

Amount of government pension: _____

Commencement date: _____

*Please provide copy of Social Security earnings statement

Planning Assumptions

Life expectancy assumption: _____

COLA assumption: _____

Life expectancy assumption: _____

COLA assumption: _____

Divorce Checklist (if applicable)

Currently unmarried? Yes No

Is former spouse at least 62? Yes No

Did the marriage last 10 years? Yes No

Date of dissolution of marriage: _____

Former spouse's PIA*: _____

Former spouse alive? Yes No

*Primary Insurance Amount

Currently unmarried? Yes No

Is former spouse at least 62? Yes No

Did the marriage last 10 years? Yes No

Date of dissolution of marriage: _____

Former spouse's PIA*: _____

Former spouse alive? Yes No

*Primary Insurance Amount

Survivor Checklist (if applicable)

Have you remarried? Yes No

If yes, age at remarriage: _____

Deceased spouse's age at death: _____

Benefit amount at time of death: _____

Have you remarried? Yes No

If yes, age at remarriage: _____

Deceased spouse's age at death: _____

Benefit amount at time of death: _____

Dependent Checklist

Do you have dependents? Yes No

If yes, how many under age 18? _____

If yes, how many under age 19 and in high school? _____

If yes, how many are disabled and cared for at home? _____

If disabled, age at which disability began: _____

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Financial Assets

Source	Owner	Value
IRAs		
Company Retirement Plans		
Checking / Savings / Money Market		
Non-Qualified Annuities		
Stocks / Bonds		
Mutual Funds		
Certificates of Deposit		
Other		

Life / Long-Term Care Insurance

Type	Insured	Owner	Death Benefit	Cash Value

Besides Social Security, Other Sources of Income in Retirement

Type	Start Age	End Age (if applicable)	Survivorship? (Y/N)	If Yes, What Percent to Survivor?

Income Need in Retirement

Amount	Start Age	End Age (if applicable)
Cost-of-living assumption on income:		

Concerns in Retirement

Potential Concerns	Yes	If Yes, number in order of importance	No
Taxes			
Leaving a legacy			
Long-term care for myself			
Long-term care for a family member			
Healthcare costs in retirement			
Having enough income			
Running out of money			
Planning for my surviving spouse's income			

Additional Notes
