

Social Security Questionnaire

Disclosure: The information provided is for informational purposes only. The Government provides and administers Social Security and ultimately determines your benefits. You should contact the Social Security Administration directly before making any final decisions. MPS LORIA Financial Planners, LLC nor any of its affiliates, members or employees can be held responsible for your Social Security decisions.

Section 1. General Information

Name:

Phone:

Email:

Birth Year:


Marital Status: Single Married

Spouse's Name:

Spouse's Birth Year:

Section 2. Social Security Statement Retrieval

Please provide a copy of your most recent Social Security Statement. Please also provide Spouse's Statement if applicable. To access your Social Security Statement, please follow the below instructions:

1. Visit www.ssa.gov/myaccount/
2. Create my Social Security Online Account
3.  Print / Save Your Full Statement

Section 3: Additional Information (check all that apply)

- One or both of us have already begun receiving Medicare benefits.
- One or both of us have already passed our full retirement age (66 for most applicants).
- One or both of us have already begun receiving Social Security benefits.
- One or both of us qualify for a pension--typically a government pension--based on earnings that were exempted from the Social Security tax.
- I might qualify for benefits as a divorced person or a widow(er).

Section 4. Life Expectancy

REPORT 1.

Our default option is based on the normal life expectancy of 82 for men and 86 for women. In the table below we have selected this choice for the first table in your report.

Husband's life expectancy:

Short (75 years of age) Normal (82 years of age) Long (88 years of age)

Spouse's life expectancy:

Short (78 years of age) Normal (86 years of age) Long (92 years of age)

REPORT 2.

Our default option is based on the possibility of a long life expectancy of 88 for men and 92 for women. If you would like to change this option, just indicate the changes by checking the boxes next to the choices you would prefer. (Note: Do not choose normal for both husband and wife since this choice will automatically be chosen for you as the first table in your report):

Husband's life expectancy:

Short (75 years of age) Normal (82 years of age) Long (88 years of age)

Spouse's life expectancy:

Short (78 years of age) Normal (86 years of age) Long (92 years of age)

REPORT 3.

For this report the default option is based on the possibility that the husband has a normal life expectancy while the wife has a long life expectancy. This would be consistent with a life expectancy of 82 for men and 92 for women. If you would like to change this option, just indicate the changes by checking the boxes next to the choices you would prefer. (Note: Do not choose normal for both husband and wife since this choice will automatically be chosen for you as the first table in your report):

Husband's life expectancy:

Short (75 years of age) Normal (82 years of age) Long (88 years of age)

Spouse's life expectancy:

Short (78 years of age) Normal (86 years of age) Long (92 years of age)

If you feel that the options that we have given you do not represent your situation (for instance you or your spouse has a life expectancy less than 70 years), select the box below and you can substitute another option for the last option you chose above.

I'd like to select specific years for exceptional circumstances
