

# Maximizing Your Social Security Retirement Benefits

Take the first step toward developing your individual plan for electing to draw benefits by completing this information and gathering relevant documents.

## CONTACT INFORMATION

Your name: \_\_\_\_\_ Spouse's name: \_\_\_\_\_

Email address: \_\_\_\_\_ Phone number: \_\_\_\_\_

## SOCIAL SECURITY INFORMATION

Your birth month/year: \_\_\_\_\_ Spouse's birth month/year: \_\_\_\_\_

Your employment income: \_\_\_\_\_ Spouse's employment income: \_\_\_\_\_

	AGE 62 OR YOUNGER	BETWEEN AGES 62 AND 67	AGE 67 OR LATER	NOT CURRENTLY WORKING
At what age do you plan to stop working?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
At what age does your spouse plan to stop working?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What will your earnings look like if you work past 62? \_\_\_\_\_ Spouse? \_\_\_\_\_

Based on your health and family history, how long do you expect to live? \_\_\_\_\_ Spouse? \_\_\_\_\_

Your Name	YOU		YOUR SPOUSE	
	Yes	No	Yes	No
Are you divorced from a marriage that lasted at least 10 years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Are you eligible for a government pension?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you reviewed your most recent Social Security statement for accuracy?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please bring your and your spouse's (if applicable) Social Security statement to our next meeting. To access your statement, create an account online at [ssa.gov/myaccount](https://ssa.gov/myaccount).

INTERNATIONAL HEADQUARTERS: THE RAYMOND JAMES FINANCIAL CENTER

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