SOCIAL SECURITY PRO TOOL FACT FINDER

This worksheet is designed to help you determine potential retirement income shortfalls and provide potential solutions where a fixed index annuity might be a good fit.

Please complete this fact finder in its entirety if you would like Advanced Markets to help you to develop a potential retirement income strategy for your client or prospect. For **Social Security illustration requests only**, please complete only the areas in bold.

CLIENT INFORMATION: *(Bolded items are required in order to receive SS Pro Illustration)*

☐ Married ☐ Divorced* ☐ Single (Never Married) ☐ Widowed*

**complete divorce checklist below* **complete survivor checklist below*

Client Name: ______________________________ **DOB:** ___________

Estimated Full Retirement Age Benefit: ______________________ Planned Retirement Age: _________

Estimated Annual Earned Income: ______________________ Desired Social Security Start Age: _______

Government Pension: ☐ Yes ☐ No Government Employer: ______________________

Subject to Social Security Taxes: ☐ Yes ☐ No ☐ Unsure Government Pension Amount: ______

Pension Commencement Date ______________________ **Live-to age:** ___________

SPOUSE INFORMATION *(If Applicable):*

Spouse Name: ______________________________ **DOB:** ___________

Estimated Full Retirement Age Benefit: ______________________ Planned Retirement Age: _________

Estimated Annual Earned Income: ______________________ Desired Social Security Start Age: _______

Government Pension: ☐ Yes ☐ No Government Employer: ______________________

Subject to Social Security Taxes: ☐ Yes ☐ No ☐ Unsure Government Pension Amount: _______

Pension Commencement Date ______________________ **Live-to age:** ___________

SURVIVOR CHECKLIST (If Applicable):

Have you remarried?	Yes ☐	No ☐
If yes, age at remarriage:	___________	
Do you have any dependent children?	Yes ☐	No ☐
If yes, how many are 18?	___________	
If yes, how many are age 19 and still in high school?	___________	
If yes, how many are disabled and cared for at home?	___________	

DIVORCE CHECKLIST (If Applicable):

Are you currently unmarried?	Yes ☐	No ☐
Is your former spouse at least age 62?	Yes ☐	No ☐
Were you married to your former spouse at least 10 years?	Yes ☐	No ☐
When was your divorce final?	___________	
What is your former spouse's Primary Insurance Amount?	___________	

SOCIAL SECURITY PRO TOOL FACT FINDER *(CONT.)*

RETIREMENT INCOME NEED:

____

____

____

ASSETS:

☐ **Bank Accounts**	*Value:* __________	*Owner:* __________
☐ **IRAs**	*Value:* __________	*Owner:* __________
☐ **Roth IRAs**	*Value:* __________	*Owner:* __________
☐ **Employer-Sponsored Retirement Accounts**		
Client	*Value:* __________	*Owner:* __________
Spouse (If Applicable):	*Value:* __________	*Owner:* __________
☐ **Brokerage Accounts**	*Value:* __________	*Owner:* __________
☐ **Annuities**	*Value:* __________	*Owner:* __________
☐ **Savings Bonds**	*Value:* __________	*Owner:* __________
☐ **Life Insurance**	*Cash Value:* __________	*Owner:* __________
	Death Benefit Amount: __________	
☐ **Other**	*Value:* __________	*Owner:* __________
	☐ *Qualified* ☐ *Non-Qualified*	

CLIENT'S FINANCIAL GOALS:

☐ Reduce Taxes

☐ Increase Income

☐ Guaranteed Income

☐ Legacy Planning Strategies

☐ Principle Protection

☐ Other: ____________________

____