

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):	DIVORCE CHECKLIST (If Applicable):
Have you remarried? Yes <input type="checkbox"/> No <input type="checkbox"/>	Are you currently unmarried? Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, age at remarriage: _____	Is your former spouse at least age 62? Yes <input type="checkbox"/> No <input type="checkbox"/>
Do you have any dependent children? Yes <input type="checkbox"/> No <input type="checkbox"/>	Were you married to your former spouse Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, how many are 18? _____	at least 10 years?
If yes, how many are age 19 and still _____	When was your divorce final? _____
in high school?	What is your former spouse's _____
If yes, how many are disabled and cared _____	Primary Insurance Amount? _____
for at home?	

TruChoice Financial Group, LLC, its affiliated companies and their representatives do not provide tax or Social Security filing advice. This worksheet is intended to help you provide information, but not advice related to Social Security benefits. Social Security payout rates can and will change at the sole discretion of the Social Security Administration. Clients should seek guidance from their tax advisor and the Social Security Administration regarding their particular situation at their local Social Security Administration office or online at www.ssa.gov.

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SOCIAL SECURITY PRO TOOL FACT FINDER (CONT.)

RETIREMENT INCOME NEED:

ASSETS:

<input type="checkbox"/> Bank Accounts	Value: _____	Owner: _____
<input type="checkbox"/> IRAs	Value: _____	Owner: _____
<input type="checkbox"/> Roth IRAs	Value: _____	Owner: _____
<input type="checkbox"/> Employer-Sponsored Retirement Accounts		
Client	Value: _____	Owner: _____
Spouse (If Applicable):	Value: _____	Owner: _____
<input type="checkbox"/> Brokerage Accounts	Value: _____	Owner: _____
<input type="checkbox"/> Annuities	Value: _____	Owner: _____
<input type="checkbox"/> Savings Bonds	Value: _____	Owner: _____
<input type="checkbox"/> Life Insurance	Cash Value: _____	Owner: _____
	Death Benefit Amount: _____	
<input type="checkbox"/> Other	Value: _____	Owner: _____
	<input type="checkbox"/> Qualified <input type="checkbox"/> Non-Qualified	

CLIENT'S FINANCIAL GOALS:

<input type="checkbox"/> Reduce Taxes	<input type="checkbox"/> Legacy Planning Strategies
<input type="checkbox"/> Increase Income	<input type="checkbox"/> Principle Protection
<input type="checkbox"/> Guaranteed Income	<input type="checkbox"/> Other: _____

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