Savvy Social Security
Client Questionnaire – Married Couples

Date of birth Husband Wife _____
Age on nearest birthday Husband _____ Wife _____
Primary insurance amount (PIA) Husband $_____ Wife $_____
Life expectancy Husband _____ Wife _____
(default 85) (default 95)

Still working?
Husband: Y N Annual income from work $_____
Wife: Y N Annual income from work $_____
Expected date of retirement Husband _____ Wife _____
Amount of desired retirement income $_____(joint)

Date of this marriage _____
Former marriages
Husband: Date of former marriage _____
Date marriage ended _____ Total number of years married _____
Reason marriage ended: death / divorce
Wife: Date of former marriage _____
Date marriage ended _____ Total number of years married _____
Reason marriage ended: death / divorce

Minor children at home? Y/N
Name _____Age _____
Name _____Age _____

Adjusted gross income from latest tax return $_____
Current income (joint)
Work $_____
Pensions $_____
Investments $_____
Other $_____
Total income $_____
Assets
Retirement accounts $_____
Savings and investment accounts $_____
Real estate not including home $_____
Other $_____
Total Assets $_____

Ever worked in a non-Social Security covered job? Husband Y N Wife Y N
If yes:
Name of employer _____ Number of years worked _____
Amount of pension $_____When entitled to pension _____

Return Completed Form to Info@MyRetirementPlaybook.com
Thank You!