

Social Security Timing Report

Year of birth for primary insured (e.g. husband) _____

Year of birth for secondary insured _____

Primary insured SS income at full retirement age (e.g. 66) \$ _____

Secondary insured SS income, current or ex-spouse, at full retirement age (e.g. 66) \$ _____

What is the projected life expectancy of the primary insured*: _____

What is the projected life expectancy of the secondary insured*: _____

At what age would you like to retire? Primary insured _____ spouse _____

How much do you need every month for retirement income \$ _____

(if you do not know how much you need use your current take home pay subtract any money you are saving to know your approximate net income need)

*if the person is in good health life expectancy is about 7 years longer than their parents.