

Client Questionnaire – Single Individuals

Client name:

Date of birth

Age on nearest birthday

Primary insurance amount (PIA) \$

Life expectancy

Still working? Yes No Annual income from work \$

Expected date of retirement

Amount of desired retirement income \$

Former marriages

Date of former marriage

Date marriage ended

Total number of years married

Reason marriage ended: Death Divorce If divorce, is ex-spouse still alive? Yes No

Date of former marriage

Date marriage ended

Total number of years married

Reason marriage ended: Death Divorce If divorce, is ex-spouse still alive? Yes No

Minor children at home? (or adult child disabled before age 22)? Yes No

Name

Age

Name

Age

Adjusted gross income from latest tax return \$

Current income

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? Yes No

If yes:

Name of employer

Number of years worked

Amount of pension \$

When entitled to pension

Also worked in covered job? Yes No Number of years worked