To help you and your advisor gather the information you need to make a suitable Social Security filing decision, answer the questions below and bring this form to a Social Security planning meeting with your advisor.

BEFORE YOU BEGIN: Get a current Social Security benefit estimate for yourself and your spouse by downloading your current statements when you register or log in to your “my Social Security” account online (www.socialsecurity.gov/myaccount).

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## INVESTMENT PROFESSIONAL’S INFORMATION

Contact the Retirement Institute Income Planning Team with any questions
Phone: 1-877-245-0763 or IPLNDESK@nationwide.com

Use this questionnaire with the Social Security 360 Analyzer®.
Access the tool at nationwidefinancial.com/socialsecurity.

OR

Send this questionnaire for the Income Planning Team to run a report. Fax the questionnaire to 1-855-256-4220.

First name: Sean  Last name: Cavanaugh

Broker/Dealer: Raymond James

Email: sean.cavanaugh@raymondjames.com  Phone: 877.462.2011  Fax: 619.462.2015

Is this a self-assessment?  Yes  No

Is this for a client or prospect?  Client  Prospect

---

Your marital status:  Married  Widowed  Divorced  Single

(If you select married, widowed or divorced, be sure to answer the related questions on Page 2 in addition to the questions below.)

---

### About You

<table>
<thead>
<tr>
<th>First name:</th>
<th>Last name:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Gender:</th>
<th>Date of birth (mm/dd/yy):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>/ /</td>
</tr>
<tr>
<td>Female</td>
<td></td>
</tr>
</tbody>
</table>

What life expectancy are you planning for?  years  months  Use average life expectancy

Have you already started Social Security benefits?  Yes  No  If yes, at what age?  Filing date: / / 

What is your gross monthly Social Security benefit amount?  

Do you have a pension from employment in which you did NOT pay Social Security taxes (typically government or non-profit employment)?  Yes  No  

If yes, Page 3 of your SS benefit statement “Your earnings statement” is required with this client questionnaire to generate a report.  

What is the name of the pension/employer?  What is the monthly pension amount? $  

When does this pension start?  What is the projected cost-of-living adjustment for this pension? $ %  

---

### Your earnings – For this section, please refer to your current Social Security benefit statement.

<table>
<thead>
<tr>
<th>Statement date:</th>
<th>Your estimated monthly benefits at full retirement age:</th>
<th>Current benefit if already elected:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

At what age do you plan to stop working?  

If you’re planning to work after 62, what is your anticipated annual employment income?  $  

---

After this section is complete, please continue on to the next page.
### About your spouse

**First name:**  
**Last name:**

**Gender:**  
- [ ] Male  
- [ ] Female

**Date of birth (mm/dd/yy):**  
- [ ] Use average life expectancy

**What life expectancy are you planning for?**  
- _______ years  
- _______ months

**Have you already started Social Security benefits?**  
- [ ] Yes  
- [ ] No

---

**Do you have a pension from employment in which you did NOT pay Social Security taxes (typically government or non-profit employment)?**  
- [ ] Yes  
- [ ] No

*If yes, Page 3 of your SS benefit statement “Your earnings statement” is required with this client questionnaire to generate a report.*

**What is the name of the pension/employer?**  
- ______________________

**What is the monthly pension amount?**  
- $_______

**When does this pension start?**
- ______________________

**What is the projected cost-of-living adjustment for this pension?**  
- $_______  
- %

---

**Your spouse’s earnings — For this section, please refer to a current Social Security benefit statement.**

**Statement date:**
- ______ / ______ / ______

**Your estimated monthly benefits at full retirement age:**  
- $___________

**Current benefit if already elected:**  
- $___________

**At what age do you plan to stop working?**
- ______________________

**If you’re planning to work after 62, what is your anticipated annual employment income?**  
- $_________________

---

**Your Retirement income assumption**

**What is your desired monthly pre-tax household income upon retirement?**  
- $_________________

**Your current benefit if already elected?**  
- $______

**What is your desired monthly pre-tax household income after the death of one spouse?**  
- $___________

---

**If you’re widowed**

*To determine survivor benefits, if eligible, you will need proof of marriage and death to retrieve benefits for a deceased spouse when you visit your local SSA office.*

**Spouse name:**
- ______________________

**Date of birth (mm/dd/yy):**
- _____ / _____ / _____

**How long were you married?**  
- _______ years  
- _______ months

**What monthly benefit amount would you receive if you elect widow’s benefits at your full retirement age?**  
- $_____________

**What is the monthly primary insurance amount (PIA) of your deceased spouse?**  
- $_________________

---

**If you’re divorced**

*You may be eligible for benefits based on an ex-spouse’s record, if you were married to that spouse for at least 10 years. You will need proof of marriage and divorce to retrieve information and benefits for an ex-spouse when you visit your local SSA office.*

**Ex-spouse name:**
- ______________________

**Date of birth (mm/dd/yy):**
- _____ / _____ / _____

**What is your ex-spouse’s anticipated life expectancy?**  
- _______ years  
- _______ months

**How long were you married?**  
- _______ years  
- _______ months

**At what age does your ex-spouse plan to claim benefits?**  
- _______ years  
- _______ months

**What monthly benefit amount would you receive if you elect spousal benefits at your full retirement age (or soonest available if you are more than 6 years older than your ex-spouse)?**  
- $_________________

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### What's next?

Bring your completed questionnaire along with your Social Security earnings statement to your next meeting with your financial advisor. You may also be eligible for additional benefits under special circumstances. Talk with your advisor about your individual family situation to see if these situations pertain to you.