



CANTLEY INSURANCE & FINANCIAL SERVICES

**SOCIAL SECURITY
FACT FINDER**

Aaron Cantley - 704.841.3888

CLIENT NAME:

SPOUSE'S NAME:

Client Date of Birth: _____

Spouse's Date of Birth: _____

Address: _____

Home Phone: _____ Cell Phone: _____ Work Phone: _____

Email- Client: _____

Email- Spouse: _____

Married (how many years) _____ Single Widowed Divorced A: Your divorce(s) B: Spouse divorce(s)

→ Are you or your spouse currently receiving Social Security Benefits? Yes No

If "Yes," Amount Receiving? _____ Date benefits began: _____

If Divorced (#A1), how many years were you married? _____ Date divorce finalized: _____

Is ex-spouse #1 alive or deceased? Alive Deceased, passed away (month and year) _____

If Divorced (#A2), how many years were you married? _____ Date divorce finalized: _____

Is ex-spouse #2 alive or deceased? Alive Deceased, passed away (month and year) _____

If Divorced (#B1), how many years were you married? _____ Date divorce finalized: _____

Is ex-spouse #1 alive or deceased? Alive Deceased, passed away (month and year) _____

If Divorced (#B2), how many years were you married? _____ Date divorce finalized: _____

Is ex-spouse #2 alive or deceased? Alive Deceased, passed away (month and year) _____

→ Are you or your spouse currently working? Yes No (Explain) _____

At what age(s) do you plan to retire from your current job(s)? _____

Do you rely on IRA Income for living expenses? Yes No Value \$ _____

Do you own your own home? Yes No If "yes," what is the Value? \$ _____

Outstanding Mortgage for Primary Residence: \$ _____ Cost Basis: \$ _____

Principal and Interest Payments \$ _____ Taxes/Insurance Payment \$ _____

Do you own other property/real estate? Yes No Description: _____

Other Property Value: \$ _____ Other Property Mortgage \$ _____ Cost Basis: \$ _____

PLEASE ATTACH YOUR MOST RECENT SOCIAL SECURITY STATEMENT(S)



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TYPE	CLIENT'S MONTHLY INCOME	SPOUSE'S MONTHLY INCOME
Social Security		
Gross Wages		
Pensions		
Spousal Pension Continuation Benefit		
Military Retirement		
Interest/Dividends		
Investment Property		
Income from IRAs		
Other		
TOTAL		

ACCOUNTS	VALUE IN CLIENT ACCOUNT(S)	VALUE IN SPOUSE'S ACCOUNT(S)
Checking Account(s)		
Savings Account(s)		
C.D. and Money Market(s)		
TOTAL (A)		
Stocks and Bonds	Value:	Value:
Mutual Funds	Value:	Value:
TOTAL (B)		
Annuities	Value: Number of Years Owned:	Value: Number of Years Owned:
Qualified Accounts	Value: Investment Type:	Value: Investment Type:
Other		
TOTAL (C)		
TOTAL COUNTABLE ASSETS		
TOTAL ASSETS COMBINED	\$	

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