



The College Tuition Benefit®
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Social Security Analysis & Strategy Report Request Intake Form

Please allow 2 business days to process request. Once processed you will receive the requested report.

Add a new client

Relationship Status	Annual Spending Needs	Estimated Monthly Education Loan Repayment Amount	Educational Loan Repayment Remaining Years	Spending Inflation (default 3%)	COLA (%) (default 2%)
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Client

First Name	Last Name	PIA Calculation Method	Estimated Monthly PIA (full retirement benefit)
DOB	Sex	Life Span	Pension Amount
		Enter Value	
		Past Earnings	
		Current Earnings	

Spouse

First Name	Last Name	PIA Calculation Method	Estimated Monthly PIA (full retirement benefit)
DOB	Sex	Life Span	Pension Amount
		Enter Value	
		Past Earnings	
		Current Earnings	

Children - minors and disabled adult children

First Name	Last Name	DOB	Expected High School Graduation
First Name	Last Name	DOB	Expected High School Graduation
First Name	Last Name	DOB	Expected High School Graduation

Upon receipt of your Social Security Analysis & Strategy Report, please keep in mind that:

1. This report is designed to illustrate the importance of your decision on when to begin Social Security benefits and to help you decide the best strategy for your situation. Detailed analysis is needed to compare different strategies side by side, especially if you are married and spousal benefits are considered.
2. This report is provided for informational purposes only. The information and data should not be acted upon or taken as advice. The purpose of the report is to educate and give general guidance to help you craft a personalized approach in taking Social Security.
3. All the information provided is based on current Social Security rules, benefits calculations, and payout promises on existing funding levels.

Submitted by (Spouse 1)
Date

Submitted by (Spouse 2)
Date