

SOCIAL SECURITY CHECKLIST



Armstrong Wealth
MANAGEMENT GROUP

Get Started

Gather your important documents.

- Social Security card
- Marriage Certificate
- Divorce Decree (if applicable)

Contact the Social Security Administration (SSA)

- Call them at 1-800-772-1213.
- Find your local Social Security office
 - SSA website where you can get the address, phone number, and office hours for your local office.
- Determine how much in benefits you are eligible for on your own record and on your spouse's (or ex-spouse's) record.

At Least 16 Weeks Prior to Filing

Create your personal my Social Security account

With your free, personal my Social Security account, you can receive:

- Personalized estimates of future benefits based on your real earnings.
- See your latest statement.
- Review your earnings history.
- Request a replacement Social Security Card.
- Check the status of an application.

Become as knowledgeable as possible about your rights and your benefits.

- Benefits Planner: Income Taxes And Your Social Security Benefit
Helps you determine if you will be subject to federal income taxes on your Social Security benefits and helps you make a more informed decision about whether or not you will have other sources of income.
- What You Need to Know When You Get Retirement or Survivors Benefits
Explains your rights and responsibilities when you receive retirement or survivors benefits.

Timing can determine whether you get full or reduced benefits.

You should know and understand your options.

- SSA Calculator: Early or Late Retirement?
Workers planning for their retirement should be aware that retirement benefits depend on age at retirement.
- AARP Calculator: When will you claim your Social Security retirement benefits?
You can use this calculator to determine the best age for you to claim your Social Security benefits.
- SSA: Retirement Estimator
Gives estimates based on your actual Social Security earnings record.

At Least 14 Weeks Prior to Filing

- Create a plan to reach your retirement goals, whether it means learning new skills to stay employed longer, saving more money for retirement or possibly downsizing.

At Least 12 Weeks Prior to Filing

- Once you are ready you will need to contact the Social Security Administration 12 weeks in advance at 1-800-772-1213 or www.ssa.gov or you can find local Social Security office here.

Content in this material is for general information only and are not intended to provide specific advice or recommendations for any individual.

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