



# Social Security Optimizer

## Is Your Social Security Payment Strategy Aligned with Your Future Goals?

I would like to ensure that your Social Security payments will be working as hard as you have toward your future retirement. The Social Security Optimizer is a two-part exercise comprised of a brief questionnaire and a personal interview to determine how well your Social Security strategy aligns with your long-term retirement goals.

## Would you like me to help?

If you answer a few questions below and email this back to me it will provide me with just enough details to follow up with a personal call. Should we get started?

Your Name \_\_\_\_\_

Marital Status ☐ Single ☐ Married ☐ Widowed ☐ Divorced

Gender ☐ Male ☐ Female

Date of Birth (mm/dd/yy) \_\_\_\_\_

Are you receiving Social Security benefits now? ..... ☐ Yes ☐ No

If "Yes," at what age did you start receiving your benefits? \_\_\_\_\_

When did you file? (mm/dd/yy) \_\_\_\_\_

Amount of your monthly benefit? \$ \_\_\_\_\_

## Your Earnings

(please refer to your current Social Security Benefit Statement at <https://www.ssa.gov/myaccount/> )

Statement date (mm/dd/yy) \_\_\_\_\_

Estimated benefit at full retirement age \$ \_\_\_\_\_

At what age would you like to stop working? \_\_\_\_\_

If you plan to work after 62, what is your expected annual income \$ \_\_\_\_\_

Have you considered discussing your Social Security strategy with a financial advisor? ..... ☐ Yes ☐ No

The information collected on this questionnaire will be kept confidential and used to provide an estimate of your Social Security benefits in retirement. Keep in mind that any estimate resulting from this fact finder is for hypothetical purposes only and is not a guarantee. This material is not a recommendation to buy, sell, hold or rollover any asset, adopt an investment strategy, retain a specific investment manager or use a particular account type. It does not take into account the specific investment objectives, tax and financial condition, or particular needs of any specific person. Investors should work with their financial professional to discuss their specific situation. This is being provided for informational purposes only and should not be construed as investment, tax, or legal advice. The information provided is based on current laws, which are subject to change at any time, and has not been endorsed by any government agency.

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