



AAFMAA Wealth Management & Trust LLC

SOCIAL SECURITY ANALYZER Input Form

AAFMAA Wealth Management & Trust's **Social Security Analyzer Report** delivers an analysis of your estimated Social Security benefits based upon differing claiming strategies. This report is available to active, veteran, and retired military personnel for a flat fee of \$250*. To receive your Social Security Analyzer Report, mail your completed Input Form and a check for \$250 to:

AAFMAA Wealth Management & Trust LLC
639 Executive Place, Suite 200
Fayetteville, NC 28305

Client Name: _____ **DOB:** _____

Sex: M/F _____

Spouse Name: _____ **DOB:** _____

Sex: M/F _____

Address: _____

Tele. Number _____ **Email:** _____

***Estimated Client Benefit at Full Retirement age:** \$ _____

***Estimated Spouse Benefit at Full Retirement age:** \$ _____

*This information is available at www.ssa.gov, or on your Social Security Statement. If acceptable, please attach a copy of your Social Security Statement to ensure accuracy. All information is confidential.

Estimated Yearly Expenses (Optional) \$ _____

Assumptions: **1) Male Life Span = 90 yrs. Female Life Span = 95 yrs.**
 2) No Non-Covered Pension (Windfall Elimination Provision)
 3) 3% Inflation Rate for Expenses

FINANCIAL PLANNING • INVESTMENT MANAGEMENT • TRUST SERVICES

AAFMAA WEALTH MANAGEMENT & TRUST LLC

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Important Disclosure: This report is for informational purposes only. All the information provided is based on Social Security rules, benefit calculations, and payout promises of existing Social Security policy at the time this report was printed. The purpose of the report is to educate and give general guidance to help craft a personalized approach to taking Social Security. AAFMAA Wealth Management & Trust LLC (AWM&T) will provide an analysis of the client's estimated Social Security benefits based upon differing claiming strategies, relying solely upon information provided by the client. Note that the Income v. Expense analysis does not include any sources of income other than the Social Security benefits calculated in the report.

AWM&T does not provide tax, legal or accounting advice. Clients should review any planned financial transactions or arrangements that may have tax, legal or accounting implications with their personal professional advisors. AWM&T shall have neither liability nor responsibility to any person or entity with respect to any loss or damage caused, or alleged to be caused, directly or indirectly, by information contained in this report or by any action or inaction taken in reliance on it.

AWM&T's fee for providing this report shall be \$250 payable prior to report preparation. This report is part of AWM&T's full financial planning capabilities. *For any client who subsequently elects to have a comprehensive financial plan prepared, the \$250 paid for this Social Security Analyzer Report will be credited against the full fee of \$2,100 for a comprehensive financial plan.*

*Grandfathered AAFMAA members, those that bought a whole life policy before July 1, 2000, can receive this report at no charge. Please provide your member number to request a fee waiver.

AWM&T services are only available to active, veteran, and retired military personnel. To learn more about our services, please visit <http://wealth.aafmaa.com> or email us at wealthmanagement@aafmaa.com. Thank you for this opportunity to be of service.