

# Social Security Benefits Worksheet 2023

## Personal Information

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Filing Status:  Single  Married  Head of Household  Qualifying Widow(er)

Planned or Actual Retirement Age: \_\_\_\_\_

## Monthly Social Security Income

Your Monthly Benefit (2023): \_\_\_\_\_

Spouse's Monthly Benefit (if applicable): \_\_\_\_\_

Dependent Benefits (if any): \_\_\_\_\_

Total Monthly Social Security Income: \_\_\_\_\_

## Annual Benefits Estimate (2023)

Monthly Income × 12 Months: \_\_\_\_\_

Total Estimated Social Security Income for 2023: \_\_\_\_\_

## Additional Income (Optional)

Pension or Annuities (2023): \_\_\_\_\_

IRA / 401(k) Withdrawals (2023): \_\_\_\_\_

Investment Income (2023): \_\_\_\_\_

Other Income (Specify): \_\_\_\_\_

Total Additional Retirement Income (2023): \_\_\_\_\_

## Combined Annual Income (2023)

Social Security + Additional Income: \_\_\_\_\_

## Notes & Reminders

- Did you start or stop receiving benefits in 2023?  Yes  No
- Any major income or health changes \_\_\_\_\_
- Do you have a Benefit Statement (Form SSA-1099) for 2023?  Yes  No