

# Social Security Benefits Worksheet 2024

## 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 (2024): \_\_\_\_\_

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

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

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

## Annual Benefits Estimate (2024)

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

Total Estimated Social Security Income for 2024: \_\_\_\_\_

## Additional Income (Optional)

Pension or Annuities (2024): \_\_\_\_\_

IRA / 401(k) Withdrawals (2024): \_\_\_\_\_

Investment Income (2024): \_\_\_\_\_

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

Total Additional Retirement Income (2024): \_\_\_\_\_

## Combined Annual Income (2024)

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

## Notes & Financial Planning

- Do you expect any major income changes in 2024? \_\_\_\_\_
- Are you delaying benefits to increase your payout?  Yes  No
- Have you checked your earnings record at SSA.gov?  Yes  No