

Social Security Income Benefits Worksheet

Personal Details

Full Name: _____

Date of Birth: _____

Filing Status: Single Married Head of Household

Retirement Start Date: _____

Social Security Income Details

Your Monthly Benefit: _____

Spouse's Monthly Benefit (if any): _____

Dependent Benefits (if any): _____

Total Monthly Social Security Income: _____

Annual Social Security Income (Monthly x 12): _____

Other Retirement Income (Optional)

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Pension or Annuities: _____

IRA / 401(k) Withdrawals: _____

Investment Income: _____

Other Income (Specify): _____

Total Other Retirement Income: _____

Combined Annual Retirement Income (SS + Other): _____

Notes & Observations

