

Social Security Retirement Benefits Worksheet

Personal Details

Full Name: _____

Date of Birth: _____

Expected Retirement Age: 62 65 67 70 Other: _____

Filing Status: Single Married Head of Household

Estimated Monthly Benefits (Based on Age)

At Age 62: _____

At Full Retirement Age (e.g., 67): _____

At Age 70: _____

Annual Benefits Projection

Monthly Benefit x 12 (at chosen retirement age): _____

Estimated Annual Benefit: _____

Spouse's Annual Benefit (if applicable): _____

Total Annual Household Benefit: _____

Other Retirement Income Sources (Optional)

Pension or Annuity Income: _____

IRA / 401(k) Withdrawals: _____

Other Investments or Savings: _____

Retirement Planning Notes

- Ideal retirement age for higher benefits: _____
- Estimated monthly expenses in retirement: _____
- Additional savings required: _____