



Social Security 360 Analyzer® Fact Finder

Before you begin: Log in and download your current Social Security statement at ssa.gov/myaccount.

Answer the questions below and bring this form to a Social Security planning meeting with your Retirement Specialist.
(If you select married, widowed or divorced, be sure to answer the related questions on Page 2 in addition to the questions below.)

Participant contact information

First/last name:	Phone:
Email:	Plan Sponsor/Employer:
I would like to review the Social Security 360 Analyzer® results with a licensed Nationwide representative: Yes No	
Your marital status:	Married Widowed Divorced Single
Sex: Male Female	Date of birth (mm/dd/yy): ____/____/____
What life expectancy are you planning for? ____ years ____ months Use average (Male = 86 years, Female = 89 years)	
Have you already started taking Social Security benefits? Yes No If yes, at what age? ____ Filing date: ____/____/____ If so, how much is the monthly benefit you're currently receiving? \$ _____	

Government or Nonprofit Employees/Former Employees

Do you have a pension from employment in which you did NOT pay Social Security taxes? Yes No

If yes, log in to ssa.gov/myaccount and print or save your full earnings record to include with your completed fact finder. Note that your full earnings record is found in the Eligibility and Earnings section that is separate from your Social Security statement.

What is the name of the pension/employer? _____ What is the monthly pension amount? \$ _____

When does this pension start? _____ What is the projected cost-of-living adjustment for this pension? \$ _____%

Your earnings *For this section, please refer to a current Social Security benefit statement.*

Statement date: ____/____/____

Your estimated monthly benefits at full retirement age: \$ _____

At what age do you plan to stop working? ____
If you're planning to work after age 62, what is your anticipated annual employment income? \$ _____

If you plan on retiring prior to your full retirement age (FRA) or if you plan on working beyond your FRA, log in to ssa.gov/myaccount and print or save your full earnings record to include with your completed fact finder.

Your retirement income assumption

What is your desired monthly pretax household income upon retirement? \$ _____ (TODAY'S DOLLARS)

What is your desired monthly pretax household income after the death of your spouse? \$ _____

After this section is complete, please continue to the next page.

About your spouse

First/last name:	Sex: Male Female
Date of birth (mm/dd/yy): ____/____/____	
What life expectancy are you planning for? ____ years ____ months Use average (Male = 86 years, Female = 89 years)	
Have you already started taking Social Security benefits? Yes No If yes, at what age? ____ Filing date: ____/____/____ If so, how much is the monthly benefit you're currently receiving? \$ _____	

Government or Nonprofit Employees/Former Employees

Do you have a pension from employment in which you did NOT pay Social Security taxes? Yes No

If yes, log in to ssa.gov/myaccount and print or save your full earnings record to include with your completed fact finder.

What is the name of the pension/employer? _____ What is the monthly pension amount? \$ _____

When does this pension start? _____ What is the projected cost-of-living adjustment for this pension? \$ _____ %

Your spouse's earnings (For this section, please refer to a current Social Security benefit statement.)

Statement date: ____/____/____	Your estimated monthly benefits at full retirement age: \$ _____
At what age do you plan to stop working? ____	
If you're planning to work after age 62, what is your anticipated annual employment income? \$ _____	

If you're widowed (If eligible for survivor benefits, you will need proof of marriage and death to retrieve benefits for a deceased spouse when you visit your local SSA office.)

Deceased spouse's date of birth (mm/dd/yy): ____/____/____	
How long were you married? ____ years ____ months	
What monthly benefit amount would you receive if you elect widow's benefits at your full retirement age? \$ _____	
What is the monthly benefit at full retirement age (FRA) for your deceased spouse? \$ _____	

If you're divorced (You may be eligible for benefits based on an ex-spouse's record, if you were married for at least 10 years. You will need proof of marriage and divorce to retrieve information and benefits for an ex-spouse when you visit your local SSA office.)

Ex-spouse's date of birth (mm/dd/yy): ____/____/____	
What is your ex-spouse's anticipated life expectancy? ____ years ____ months	Deceased
How long were you married? ____ years ____ months	
At what age does your ex-spouse plan to claim benefits? ____ years ____ months	
What is your ex-spouse's monthly retirement benefit at his/her full retirement age? \$ _____	

To be completed by your Financial Professional/Retirement Specialist

Name:	Firm name:
Phone:	Email:
Financial Professionals return completed forms to: Email: NRPlanning@nationwide.com Fax: 1-855-256-4220 Questions? Call 1-877-245-0763	Retirement Specialists return completed forms to: Email: INVESTNW@nationwide.com Fax: 1-888-807-2140 Questions? Call 1-866-975-6363

The information collected on this questionnaire will be kept confidential and used to provide an estimate of your Social Security benefits in retirement. For more information on how Nationwide protects your personal information, visit our online privacy policy at www.nationwide.com/privacy-security.jsp. Keep in mind that any estimate resulting from this fact finder is for hypothetical purposes only and is not a guarantee.

This material is not a recommendation to buy or sell a financial product or to adopt an investment strategy. Investors should discuss their specific situation with their financial professional.

Information provided by Retirement Specialists is for educational purposes only and is not intended as investment advice. Retirement Specialists are registered representatives of Nationwide Investment Services Corporation, member FINRA, Columbus, Ohio.

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The information provided is based on current laws, which are subject to change at any time, and has not been endorsed by any government agency.

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