<table>
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<tr>
<th>Not FDIC Insured</th>
<th>May Lose Value</th>
<th>Not Bank Guaranteed</th>
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<td>Not Deposits</td>
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This questionnaire will help you take the first steps toward developing your customized Social Security strategy. It is also designed to help coordinate your Social Security benefits with other tools and strategies that may be suitable to your needs and goals. Remember, Social Security planning is only one piece of your complete retirement income strategy.

**PERSONAL INFORMATION**

Know your Social Security number.

This section will help you gather the materials necessary to apply for benefits and estimate benefit amounts.

1. Name at birth
   
2. Date of birth
   
3. Place of birth
   
4. Are you a U.S. citizen? Yes or No
   
5. Active duty before 1968 (beginning and ending dates)
   
6. Do you receive a pension or annuity from employment with state or federal government or a foreign employer? Yes or No
   
7. Are you currently married? Yes or No
   
   Spouse’s name
   
   Spouse’s date of birth

**Know your spouse’s Social Security number.**

   Date of current marriage
   
   Place of current marriage
   
8. Names of unmarried children under age 18
   
   
9. Employers for the past two years
   Name: ________________________________
   Address: ________________________________

10. Are you self-employed? Yes or No

11. Estimated earnings (last year, this year, and next year) $ _________ $ _________ $ _________

**Know your direct deposit information (for benefit payments)**

**IF YOU ARE DIVORCED OR WIDOWED**

Date of previous marriage

Place of previous marriage

How marriage ended Death, Divorce, or Annulment

Date marriage ended
# SOURCES OF INCOME

This section will help you decide whether to delay benefits and determine what effect taxes will have on your retirement income.

1. What is your current modified adjusted gross Income (MAGI) for the current year?  
   - **You**: $__________  
   - **Spouse**: $__________

2. What is your expected annual MAGI in retirement?  
   - **You**: $__________  
   - **Spouse**: $__________

3. What is your approximate net worth?  
   - **You**: $__________  
   - **Spouse**: $__________

4. What sources of monthly income will you have in retirement?  
   - **Pension plans**: $__________  
   - **Qualified plans (SEP, SIMPLE, 401(k), 403(b), etc.)**: $__________  
   - **IRAs**: $__________  
   - **Non-qualified annuities**: $__________  
   - **Life insurance**: $__________  
   - **Rental property**: $__________  
   - **Full or part-time employment**: $__________  
   - **Other**: $__________

# MONTHLY HOUSEHOLD EXPENSES

What basic expenses do you anticipate in retirement?  

- **Housing (mortgage, taxes, upkeep, insurance, etc.)**  
  (Average: $1,359/month)  
  _________________

- **Transportation (car, gasoline, insurance, etc.)**  
  (Average: $619/month)  
  _________________

- **Food**  
  (Average: $504/month)  
  _________________

- **Medical (insurance, prescriptions, etc.)**  
  (Average: $523/month)  
  _________________

- **Entertainment**  
  (Average: $210/month)  
  _________________

- **Taxes (federal, state, municipal)**  
  _________________

*Per household, 65+, Source: Bureau of Labor Statistics, Consumer Expenditure Survey, 2017*
WORKING IN RETIREMENT

This section will help you estimate how much you expect to earn in retirement and how those earnings will affect your Social Security benefits.

1. At what age do you plan to retire?
   
   You Spouse

2. Do you plan to continue to work in retirement?
   
   

3. How much income do you plan to earn each month?
   
   $ $

4. How long do you plan to work?
   
   

5. Do you plan to care for others?
   (parents, children, relatives, etc.)

   Yes or No

Maintaining your quality of life is an important part of your retirement strategy. What lifestyle do you expect to enjoy in retirement? Will you want to visit family, contribute to a grandchild’s education, spend more time on hobbies, or travel to the faraway places you’ve dreamed about? An objective examination of your anticipated retirement income and basic needs can help you and your financial professional address gaps in your retirement strategy.

This material is not connected with or endorsed by the Social Security Administration.

When it comes to preparing for your future, there’s no time like the present.

Let’s get started today.
Find out more at transamerica.com

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