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Social Security Benefit Planning Services

A strategic approach to taking your Social Security benefits can mean the difference of many thousands of dollars in lifetime retirement income received or lost. Without a complete understanding of the over 2,700 rules governing this program, you run the risk of leaving money on the table - don't let this happen to you!

Below are the benefit planning services we offer. For each level of service, you must provide accurate, current information so we can help you understand which Social Security options will fit your personal situation and potentially increase your benefits. All services include a detailed overall plan to maximize your benefits, along with a summary to help you see and understand your best options at a glance.

Whichever level of service you select, you'll be gaining the valuable insight and information you need to ensure you optimize your lifetime Social Security income, based on your individual circumstances and life expectancy.

Customized Social Security Planning Analysis \$497

This customized Social Security analysis and plan is appropriate for most people aged 50-70. You will need to complete our planning questionnaire and provide social security statements, pension details and projected future retirement earned income. A qualified Social Security Benefits Planner will analyze your options, and you will receive a summary and a detailed plan outlining your best options for maximizing benefits via email. Your plan will allow you to:

- Understand your different options for claiming benefits at various ages and what your benefits would be under each scenario.
- Learn the best age for you to claim benefits given your unique family and benefit history.
- If you are married, learn when each spouse should claim benefits for maximum income.
- If you are or were involved in a long-term LGBT relationship, learn about potential options available to you.
- If you are divorced and not remarried, understand your options for spousal benefits or widowers benefits.
- If you are widowed, understand the different rules that apply to your Social Security benefits and which options are best for you.
- If minor children are involved, find out how much their benefit will be if you are disabled, widowed or retired.



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High Level Customized Social Security Planning Analysis \$1497

Some individuals and couples aged 50-70 will benefit from this higher-level analysis and customized Social Security plan. This option includes a consultation by phone or Internet conference to ask detailed questions and discuss more complicated situations that may not be covered by the standard questionnaire. Situations that may require the deeper analysis provided with this plan include:

- Pensions that did not pay into Social Security (some teachers' pensions, firefighters, government employees).
- Employment abroad.
- Immigration (work credits from certain foreign countries can be applied to the U.S. Social Security system).

You will need to complete our planning questionnaire and provide Social Security statements, pension details and projected future retirement earned income. A qualified Social Security Benefits Planner will analyze your options and you will receive a summary and a detailed plan via email outlining your best options for maximizing benefits. Your plan will allow you to:

- Understand your different options for claiming benefits at various ages and what your benefits would be under each scenario.
- Learn the best age for you to claim benefits given your unique family and benefit history.
- If you are married, learn when each spouse should claim benefits for maximum income.
- If you are or were involved in a long-term LGBT relationship, learn about the benefits you may be entitled to. (Some long-term partners may still be able to get benefits now even if your partner is deceased.)
- If you are divorced and not remarried, understand your options for spousal benefits and whether you should file for Social Security benefits under your own earning history or your ex-spouse's for maximum income.
- If you are widowed, understand the different rules that apply to your Social Security benefits and which options are best for you.
- If minor children are involved, find out how much their benefit will be if you are disabled, widowed or retired.



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Social Security Pre-Analysis for those under 50 \$397

This plan is specifically designed for those who are currently under age 50 but who want to get an idea of what their Social Security retirement income may look in the future. Having this information is valuable for everyone, as it allows you to create realistic plans for the future and adjust your savings or timeline as desired. However, it is particularly important for certain individuals including:

- Business owners who wish to understand how changing the amount they pay themselves will affect their future Social Security.
- People who are considering early retirement.
- Widows and widowers who need to understand their potential benefits, including payments for minor children and non-working spousal benefits.
- Those who are going through a divorce.
- Divorced people and widowed who are considering remarriage.
- Divorced individuals who wish to understand the benefits they could receive if their ex-spouse should die.
- Caregivers and at home parents understand ways that they can qualify when needed for Social Security benefits at retirement.

Comprehensive Social Security Planning with Analysis by a Retirement Planner \$4997

For those who understand the value of Social Security planning and wish to discuss their options with one of our senior planners, we offer a comprehensive planning and analysis package. This analysis will include all the benefits of the above plans in addition to an in-depth call or in person meeting in our Atlanta office to discuss your social security options.

Don't put your retirement income at risk – or be unable to retire at all – by losing out on potential Social Security benefits that are legally yours. Complete an analysis by a qualified Social Security Benefits Planner to learn which of the many Social Security options and timelines is best for you. Making an informed plan now will ensure that you have the critical information you need to understand this complex government insurance program as you make decisions that will have a dramatic impact on you and your family's financial future.