Nationwide®
is on your side

Complete this form and have your financial professional return it to the Nationwide Retirement Institute Planning Team.

NRIplanning@nationwide.com
Fax: 1-855-256-4220

Have questions? Call 1-877-245-0763.

Social Security 360 Analyzer® Fact Finder

Wholesaler name: _____ Meeting reference: _____

FINANCIAL PROFESSIONAL CONTACT INFORMATION:	☐ BROKER/DEALER ☐ BGA ☐ IMO ☐ RIA
First name:	Last name:
Firm/BGA/IMO name:	Phone:
Send report to (email):	Address (street, city, state, ZIP code):

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 financial professional
(If you select married, widowed or divorced, be sure to answer the related questions on Page 2 in addition to the questions below.)

About you

First name: | Last name:

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 (Men=86 years, Women=89 years)

Have you already started Social Security benefits? ☐ Yes ☐ No If yes, at what age? _____ Filing date: ___/___/___
If so, how much is the monthly benefit you're currently receiving? $_____

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 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, please send a pdf copy of your full earnings record. You will find this in the Eligibility and Earnings section after logging in to ssa.gov/myaccount.

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 on to the next page.

About your spouse

First name: Last name:

Sex: ☐ Male ☐ Female Date of birth (mm/dd/yy): _____ /_____/_____

What life expectancy are you planning for? _____ years _____ months ☐ Use average (Men=86 years, Women=89 years)*

Have you already started Social Security benefits? ☐ Yes ☐ No If yes, at what age? ____ Filing date: ____ /____ /____
If so, how much is the monthly benefit you're currently receiving? $_____

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 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 primary insurance amount (PIA) of 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 monthly benefit amount would you receive if you elect spousal benefits at your full retirement age (or soonest available if you are more than 6 years older than your ex-spouse)? $_____

• Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution • Not insured by any federal government agency • May lose value

The information collected on this fact finder 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 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.

The information on this sheet is provided for informational purposes only and should not be construed as investment, tax or legal advice. 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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NFM-11991AO.17 (08/25)