



Request your FREE Personalized "Key to Social Security" Report

Please complete this "Key to Social Security" Report and return to our office.

Fax: (440) 944-8080

Email: info@bucholtzconsulting.com

Mail: Bucholtz Consulting, 2786 SOM Center Road, Suite 102, Willoughby Hills, OH 44094

(If needed, we can take your information over the phone. Please call (440) 944-7070 and we will assist you.)

If you have any questions as you work through these materials, please contact us at (440) 944-7070 or (800) 944-3134. Bucholtz Consulting maintains strict confidentiality. Securities and advisory services offered through Commonwealth Financial Network, Member FINRA/SIPC, a Registered Investment Advisor.

Your Name: _____ Date of Birth: ____/____/____

Spouse's Name: _____ Date of Birth: ____/____/____

Phone Cell: _____ Phone Home: _____

Email: _____

Are you currently employed? Yes No

When do you anticipate retiring? Month and Year _____

Is your spouse currently employed? Yes No

When is his/her anticipated retirement? Month and Year _____

Are either you or your spouse currently collecting Social Security or disability benefits?

Yes No _____

To complete your personalized "Key to Social Security" report, we will need your most recent Social Security Administration statement. Please email or fax the Social Security statements for yourself and your spouse (if married) to: info@bucholtzconsulting.com or fax to: 440-944-8080.

To obtain your Social Security statement, please go to www.ssa.gov/myaccount.

Are either you or your spouse eligible for a retirement plan that did not contribute to Social Security?

Yes No (If yes, please select all that apply)

- Government PERS
- Teachers STRS
- Other _____

Do you have a 401(k) or 403(b)? Yes No (If yes, please select all that apply)

- 401(k)
- 403(b)