

## Social Security Planning Presentation Consultation & Option A/B Resources

On a scale of 1 to 5 (1= don't understand; 5 = fully understand), please rank yourself on your knowledge/ understanding both before and after our presentation:

Before

After

Concepts & techniques on maximizing  
Social Security Income

When to elect Social Security and sequence  
Income withdrawal from retirement accounts

Please rate the speaker on a scale of 1 to 5 (5 = best):

Comments: \_\_\_\_\_

### Choice A ~ Consultation to Assess Social Security with your "big picture" financials

Your contact information:

**Name**

**Contact me by:**

Email:

Telephone:

**Appointments are held:** 9 a.m. to 5 p.m. First Appointments are done Online

Schedule at [www.Meetme.so/KurtJackson](http://www.Meetme.so/KurtJackson) Click on Smart Retirement then Social Security Strategy Session, next choose your time.

**Office location:**

KJ Financial

1417 Limerick Ct.

Liberty, MO 64068

Direct Line: 816.582.5532 Email: [Kurt@KJFinancialOnline.com](mailto:Kurt@KJFinancialOnline.com)

I will complete a financial questionnaire.

I have in excess of \$200,000 investable assets (excluding primary residence).

**I would like to be included on your email & phone list for future financial planning events or resource items.**

**I know of a group (service club, employer, church group, etc.) that might like to host your Social Security income planning presentation:**

Name of group:

Name of contact:

Tel:

**I have a friend, family member, or colleague who would appreciate help with their Social Security income election. I will call him/her first and let them know to expect your call:**

Name:

Tel:

Name:

Tel:

**-Option B Resources to Do It Yourself. See Page 2.-**

## Choice B ~ Do It Yourself Resources

### Social Security Income Planning Service Providers and Software Portals

- Quick Social Security Calculation (KJ Financial) [www.MaxMySocialSecurityBenefits.com](http://www.MaxMySocialSecurityBenefits.com)
- Social Security Advice (service provider) <http://www.socialsecurityadviceonline.com>
- Premier Social Security Consulting (service provider) [www.premiersocialsecurityconsulting.com](http://www.premiersocialsecurityconsulting.com)  
Tel. 1.800.518.0761
- Maximize My Social Security calculator (software portal) <http://www.maximizemysocialsecurity.com/>  
Contact via website email

### Other Useful Social Security Resources

- <http://www.ssa.gov/> Social Security government website
- <http://www.crr.bc.edu> Center for Retirement Research, Boston College  
Go to *WORKING PAPERS*: Search term is *Social Security* or *Social Security income*

\* **Kurt Jackson and KJ Financial** is not affiliated with the Social Security Administration or any of the referenced Social Security income service provider or software provider/website portals.