



Workshop Goals

This session on Social Security Optimization seeks to help people approaching retirement develop a strategy for their retirement income planning using Social Security as their foundation. Please take a minute and jot down your initial thoughts regarding your expectations of this workshop and be prepared to participate in the initial class discussion so your instructor can best mold the class to the needs of those present.

Name: _____ **Occupation:** _____

Spouse's Name: _____ **Occupation:** _____

Phone: _____ **Email Address:** _____

1. We are hoping this workshop would help me/us _____

2. On a scale of 1—10, how would you rate your understanding of Social Security? _____

3. Are you currently retired? _____ Yes _____ No
If not, what is your target date? _____

4. In order of importance, rank the following concerns with 1 being your top concern:
____ Medicare ____ Social Security ____ Taxes ____ Healthcare Costs ____ Running out of
money ____ Having enough income

5. What other immediate concerns do you have now that you may actually be retiring? _____

6. What steps, if any, have you taken to address these concerns? _____

7. What do you believe will be your greatest annual expense during retirement? _____

8. When I retire, I really want to do the following...

- A. _____
- B. _____
- C. _____
- D. _____