

Thank you for your interest in a personal Social Security Analysis. As a Registered Social Security Analyst®, I will assist you in determining your optimal scenarios for maximizing your Social Security benefits.

### **Step 1: Engagement Letter**

To begin this process, you will need to sign the Engagement Letter. This will acknowledge your willingness to proceed in this process. The Engagement Letter and signature can be accessed via this direct link: <https://www.kcnbenefitadvisors.com/about-5>.

You will state your marital status, which will determine the information we need and the fee for the analysis.

Single (never married) - \$150.00 (US)

Married (includes widowed or ex-spouse) - \$250.00 (US)

Married with minor or adult disabled children - \$300.00 (US)

**Paying your invoice:** You will receive an invoice, via email, for your service payment. The invoice is from PayPal, but you do not need to have a PayPal account to pay the invoice. On the payment page, choose pay with debit or with credit card, or choose the guest check out feature.

### **Step 2: Client Information Form**

The client information form will provide the personal demographic information needed to compile your personal Social Security projections. The attached PDF is fillable, so you can complete the information, SAVE your changes and attach the completed form on a return email. My email is encrypted, but if you do not feel comfortable emailing, we can collect this information over the phone.

**Note: Projected Maximum Age of Life:** We need to state an estimate of projected longevity to provide for various scenarios. The livingto100.com link can be helpful, but the questions can seem intrusive.

We can use the default ages of Men – 76 / Women – 81, or, if you have specific insight based on family history / health, we will use those estimates.

### **Step 3: Gathering earnings history**

#### **How to download and import your Social Security Statement:**

To accurately provide your estimates, we need a record of all of your reported earnings via your MySocialSecurity.com account. We need to import the values of your Social Security earnings record using an XML file from the Social Security Administration (SSA) website. **(For data security purposes, this information will not include your Social Security number.)**

Follow these steps:

1. Go to the Social Security Administration website ([www.SSA.gov](http://www.SSA.gov)) and create an account if you don't already have one.
2. Log in using your SSA username and password.
3. Click on Your Social Security Statement.
4. Click the "Download Statement Data as an XML file" link to download your XML data to your device. (see below)
5. Email the download as an attachment to **KCNBenefit@yahoo.com**

Note in the Email the name of the person this attachment is for.

(Do not open the attachment and try to 'save as' – it is encrypted and will just show code.)

6. Repeat Steps 2 thru 3 to download the XML data for a spouse. **Send the spouse XML attachment as a second email please! KCNBenefit@yahoo.com**

\* The PDF file of your Social Security Statement is **NOT** compatible for upload.

**This is what you will see:**

#### **Important Information**

If you are using a public computer, please be aware that when viewing, saving, or printing any documents, the computer you are using may store a temporary copy.

Use the link below to access your statement.

[Your Social Security Statement](#)

[Disclaimer](#)

[Download Statement Data as an XML file](#) 