

SOCIAL SECURITY

checklist



There are three ways to apply for Social Security:

1. Online at www.socialsecurity.gov – for retirement, disability, and spousal benefits only (not survivor benefits).
2. By phone at 800-772-1213 (TTY 800-325-0778).
3. In person at a local Social Security office. Use the Social Security office locator at www.ssa.gov for the address, hours, and driving directions.

Have ready the following when you make your application:

- Social Security number
- Name at birth
- Date and place of birth
- Citizenship status
- The beginning and ending dates of each period of active-duty service, if service occurred before 1968
- Whether you receive, or expect to receive, a pension or annuity based on employment with the federal government or one of its state or local subdivisions
- Current marital status and spouse's name, date of birth, and Social Security number
- The name, date of birth, and Social Security numbers (if known) of any former spouses
- The dates and places of each marriage and, for marriages that have ended, how and when they ended.
- Name of any unmarried children under age 18
- The name and address of each employer for the last two years
- Information about self-employment
- Estimated earnings for the last year and this year (and next year, if application is made between September and December)
- If you are within three months of turning 65, whether you want to enroll in Medicare Part B
- Direct deposit numbers (from a check) if you want benefits deposited automatically