



# Your Benefits Masterclass Worksheet

**From slide 6** Write down any of your own future concerns here:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**From slide 12** What year would you like to retire? \_\_\_\_\_

What are the Best Dates to retire for that year?

\_\_\_\_\_  
\_\_\_\_\_

**From slide 16** What is your **MRA** (Minimum Retirement Age) based on the chart?

\_\_\_\_\_ years \_\_\_\_\_ months

**From slide 17** What is your **FRA** (Full Retirement Age) with Social Security?

\_\_\_\_\_ years \_\_\_\_\_ months

**From slide 26** If you know you have the Basic Life insurance benefit:

Your annual basic rate of pay      \$ \_\_\_\_\_

Rounded up \$1000 + \$2000 =      \$ \_\_\_\_\_

Your Total Basic Death Benefit      \$ \_\_\_\_\_