

SOCIAL SECURITY DOCUMENTS CHECKLIST

WHAT YOU NEED TO APPLY FOR SOCIAL SECURITY



CREATE AN ACCOUNT



First, you must create an account or log into your pre-existing account. To create an account, the Social Security Administration (SSA) will ask you a series of identity questions for verification. You may want to have certain items on hand, so you're prepared for additional security questions, such as, but not limited to: mobile phone, credit card, W-2, and tax forms.



FILE FOR BENEFITS ONLINE

Here's all the information you'll need to reference:

- Your Social Security card or a record of your number.
- Your original birth certificate, a copy certified by the issuing agency, or other proof of your age. **The SSA must see the original document(s), or copies certified by the agency that issued them. They cannot accept photocopies or notarized copies.**
- If you were not born in the U.S., proof of U.S. citizenship or lawful alien status. **The SSA must see the original document(s), or copies certified by the agency that issued them. They cannot accept documents if they're expired. They also cannot accept photocopies or notarized copies.**
- A copy of your U.S. military service paper(s) if you served before 1968. A photocopy is acceptable.
- A copy of your W-2 form(s) and/or self-employment tax return for last year. A photocopy is acceptable.



MISSING DOCUMENT? NO PROBLEM!


Don't delay applying for Social Security retirement benefits. Missing documents can always be provided later and the SSA may even be able to help you find or track them.


Retirement should not be a journey you walk alone. If you're considering retirement and need a professional to efficiently guide you through the process, feel free to contact us with any questions you have.


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