

Social Security Retirement Checklist

Everything you need to gather before applying for SSA retirement benefits.

Personal Documents

- ☐ Original or certified copy of your birth certificate
- ☐ Social Security card (or a record of your SSN)
- ☐ Proof of U.S. citizenship or lawful immigration status
- ☐ Most recent W-2 form or self-employment tax return
- ☐ Military discharge papers (DD-214) if you served before 1968

Family & Marital Records

- ☐ Marriage certificate (if applying for spousal benefits)
- ☐ Final divorce decree (if divorced after a marriage of 10+ years)
- ☐ Death certificate of a spouse (if applying for survivor benefits)
- ☐ Names and birth dates of any minor or disabled children

Financial Information

- ☐ Bank name, routing number, and account number for direct deposit
- ☐ Any pension or retirement account information
- ☐ Employer name and address for the last two years

Decisions to Think About

- ☐ The month you want benefits to begin
- ☐ Whether you plan to keep working after claiming
- ☐ Whether you want Medicare Part B enrollment at the same time

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