



ALL THINGS SOCIAL SECURITY

WITH JOHN R. BERRY, CFP®

TODAY'S HIGH POINTS

- Eligibility
- Maximizing benefits
- Retirement considerations
- Medicare basics
- Resources



SOCIAL SECURITY ELIGIBILITY BASICS



MAXIMIZING YOUR BENEFITS



EXAMPLE: MAXIMIZING YOUR BENEFITS

Age 61

Salary \$95,000

Claims early: \$2,272

Claims at full retirement age (67): \$3,242

Claims at 70: \$4,022

National Average Benefit: \$1,976

What should
I consider
before
retiring?

health
payments hobbies
grandchildren friends pension
vacation planning
SOCIAL SECURITY
debt 401K
travel TIME family
457
insurance



WHAT ABOUT MEDICARE?



RESOURCES

- SSA.GOV
- FINANCIAL PLANNER
- TCDRS

DISCLOSURE

This presentation was created for educational and informational purposes only and is not intended as ERISA, tax, legal or investment advice. If you are seeking investment advice specific to your needs, such advice services must be obtained on your own separate from this educational presentation.