

Social Security Administration

Link: <https://www.ssa.gov/>

1. Create an Account

- a. When was the last time you received a retirement statement?
- b. Your task is to request a copy of your Social Security Statement.
- c. Create online account
- d. Use the online tools to calculate your retirement benefits

Some of the things you can go with “My Social Security” account:

- ✓*new* Get personalized retirement benefit estimates using the new Retirement Calculator
- ✓*new* Opt out of mailed notices for those available online
- ✓Check your application status
- ✓Set up or change direct deposit
- ✓ Request a replacement Social Security card
- ✓*new* Access the Representative Payee Portal
- ✓Get a Social Security 1099 (SSA-1099) form
- ✓Get a proof of income letter
- ✓Change your address if you're a beneficiary

Credit Reports

Get your Credit Reports

3 Major Agencies:

1. Transunion
2. Equifax
3. Experian

1. Annual Credit Report.com

Link: <https://www.annualcreditreport.com/index.action>

Website: www.annualcreditreport.com

Note: Gives you all 3 credit reports for free, once per year, but no scores are given.

2. Credit Karma

Link: <https://www.creditkarma.com/>

Website: www.creditkarma.com

Other Financial Companies, Agencies, or Investment Firms

Types of Accounts: 401K, 403b, Annuities, Pensions

Whatever the financial firms that controls your Retirement Funds you need to learn:

- Status of your funds now and projected at your retirement age
- Many of these companies are setting up Financial tools on their website that will help you manage and learn how to increase your retirement funds