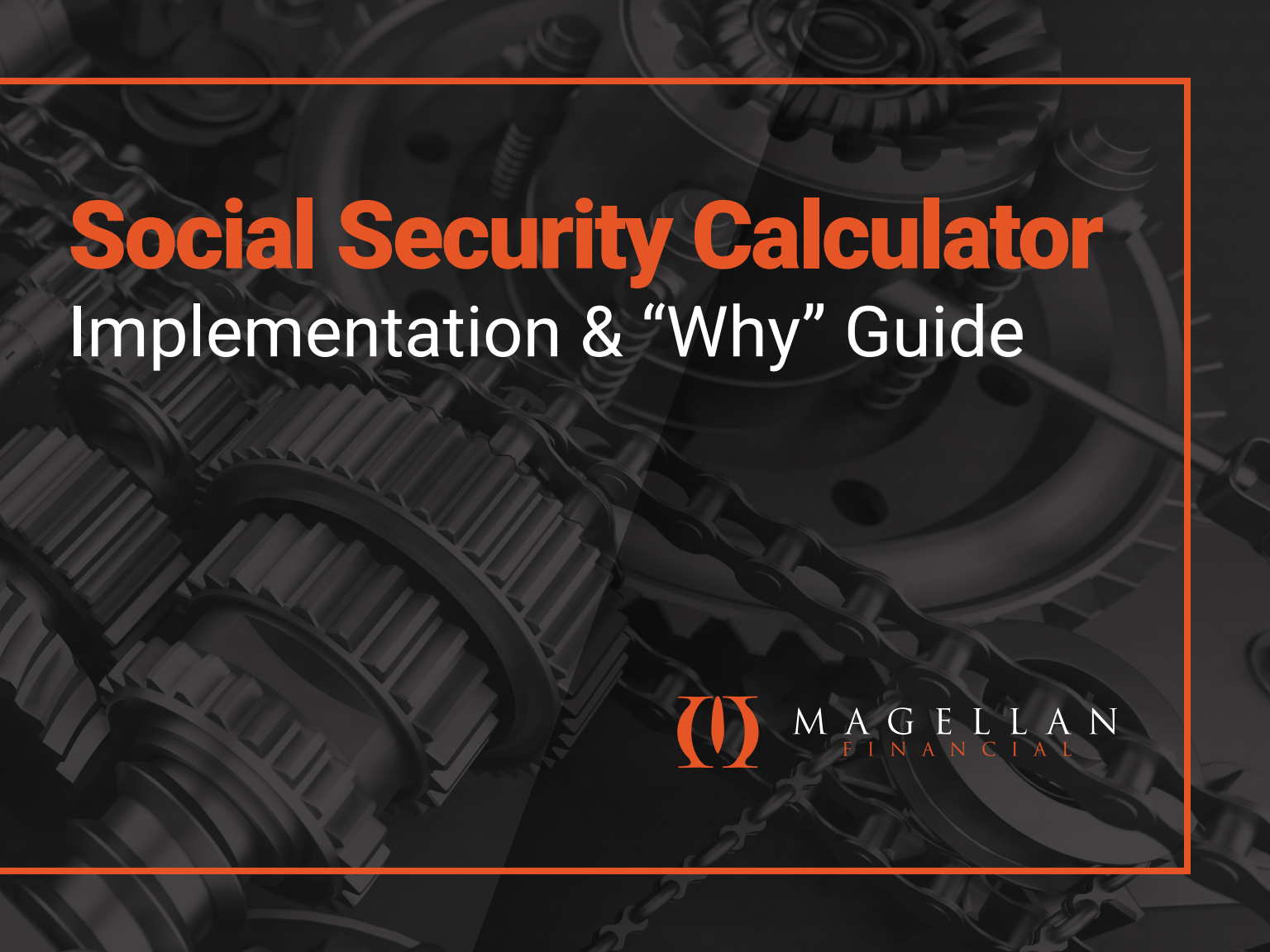




Social Security Calculator

Implementation & “Why” Guide



MAGELLAN
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Social Security Calculator

Helping clients make more informed Social Security claiming decisions.

What It Is

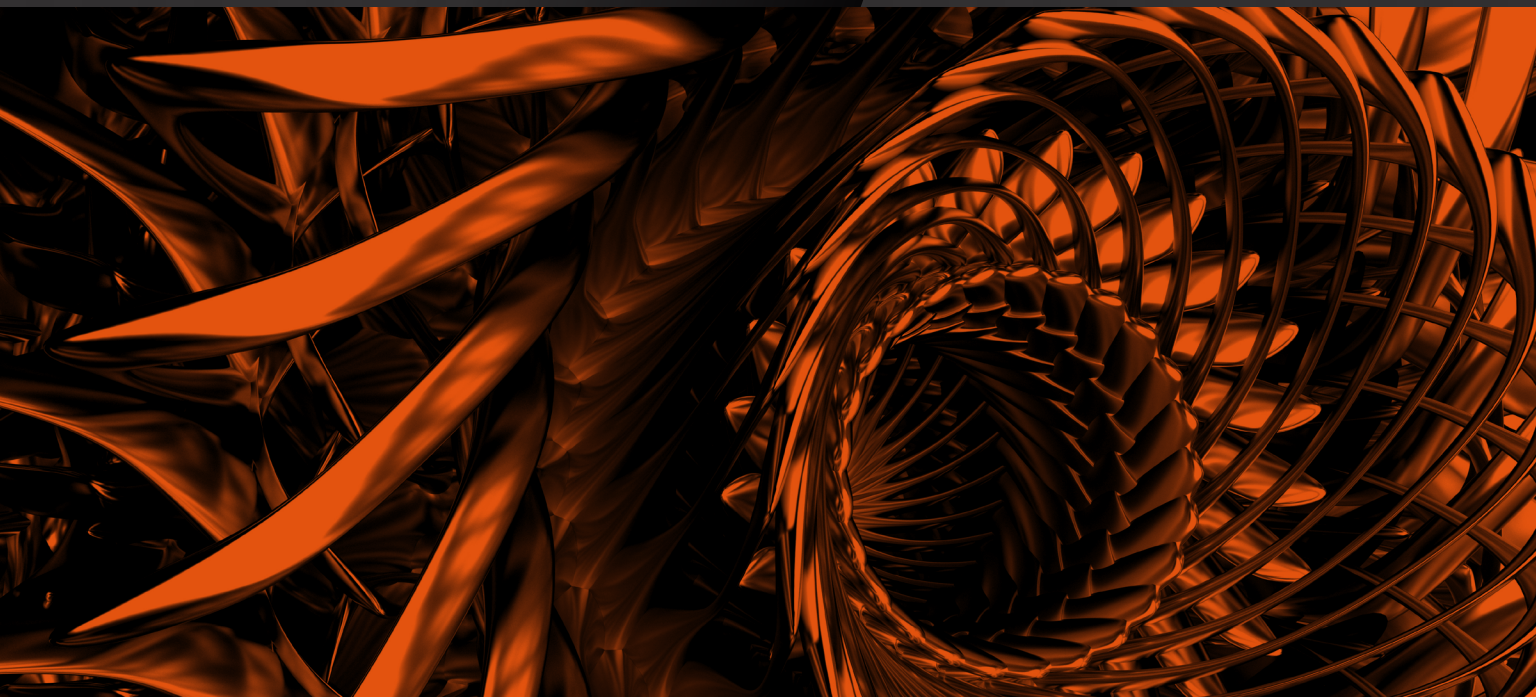
The **Social Security Calculator** is an interactive forecasting tool designed to help clients estimate and evaluate their future Social Security benefits.

Before using the calculator, participants provide basic **personal details** (name, email, phone number, address), thereby creating a built-in lead-generation opportunity for the advisor.

The calculator helps illustrate how claiming age and retirement timing may impact future Social Security income. Rather than relying on assumptions or general rules of thumb, clients receive a personalized forecast based on the information they provide.

To simplify promotion, Magellan purchases a **custom domain name** for each practice, such as MagellanSSTest.com. This memorable domain routes directly to the advisor's personalized calculator.

Every submission goes directly to your advisor dashboard, allowing you and your team to view all new leads in one place, no more sorting through multiple email notifications. From there, you can update statuses from New to Working to Closed and follow up quickly while interest remains high.





Why It Works

- Social Security remains one of the most misunderstood retirement income sources.
- Many individuals claim benefits without fully understanding the long-term impact of their decision.
- Creates awareness around claiming strategies and retirement income planning.
- Positions the advisor as an educator and planning resource.
- Generates highly qualified leads because participants are actively thinking about retirement timing and income needs.

Ways To Use It

TV SHOWS: Discuss common Social Security mistakes and direct viewers to complete the calculator at your custom domain.

"Before you make one of the biggest retirement decisions of your life, visit [DOMAIN NAME] and use our free Social Security Calculator."

RADIO SHOWS: Use the calculator as a call-to-action during Social Security, retirement income, or tax-focused segments.

"Before you make one of the biggest retirement decisions of your life, visit [DOMAIN NAME] and use our free Social Security Calculator."

DIGITAL MARKETING: Promote the calculator through email campaigns, social media, website banners, landing pages, and digital advertising.

WORKSHOPS & EVENTS: Include a QR code linking directly to the calculator on workshop materials and presentation slides.

Ways To Use It *Cont.*

CLIENT REVIEWS: Use it as a value-added service that helps clients revisit retirement income decisions.

SOCIAL MEDIA: Share educational posts such as:

"Do you know the difference between claiming Social Security at 62 versus waiting until full retirement age? Find out with our Social Security Calculator."

Conversation Starters

"When do you plan to claim Social Security benefits?"

"Have you ever calculated how much your monthly benefit could change based on when you file?"

"One of the most important retirement decisions you'll make is when to claim Social Security."

"What if one simple decision could impact your retirement income for decades?"





Advisor Best Practices

- Review new submissions regularly through your Google Spreadsheet.
- Use the calculator results as the starting point for a broader retirement income discussion.
- Pair Social Security conversations with tax planning, income planning, and Roth conversion discussions.
- Incorporate the calculator into your existing retirement planning process.

Lead Follow-Up Strategy

Every submission represents someone actively thinking about retirement income. We recommend contacting each lead shortly after they complete the calculator. Thank them for using the tool and offer to review their results together.

After the initial conversation, add the lead to your **drip marketing funnels** and ongoing educational campaigns.

Think of these leads as a **long-term opportunity rather than an immediate appointment**. Continue delivering value through retirement income education, Social Security updates, workshop invitations, and relevant planning content.

Consistent communication helps build familiarity and trust, increasing the likelihood that the prospect will schedule a meeting when the timing is right.





Access & Personalization

Each advisor receives:

- A personalized Social Security Calculator
- Firm branding, logo, and disclosures
- A custom domain name (e.g., MagellanSStest.com)
- Lead collection through a dedicated Calculator Dashboard

For setup assistance, customization requests, or questions regarding your calculator, contact the **Magellan Marketing Team**.



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