



Use this this when visiting a local Social Security office to keep track of what you discuss

Client Name:

Office Name:

Date:

Office Phone Number:

Ticket #:

National Phone Number: 800-772-1213

Window#:

(Not Recommended)

SSA Rep Name:

SSA Rep Position:

Reasons for Visit:

Make sure this is documented in the visitor in-take system

Questions for SSA:

Write down any questions you may have in advance, so you don't forget

Appointment made?

Type of Appointment: In-Person/Phone (Circle One)

Appointment Info:

Date:

Time:

Proofs requested: i.e Marriage, Divorce, Adoption, Guardianship, Birth Certificate

If an appointment was made, review the following;

- Verify the primary phone number and list an alternate number if possible. If possible, avoid spam-call apps that will block the call. Make sure you are in an area with good reception.
- Ensure the spelling of your address is correct as well for any correspondence that will be mailed.
- If filing for Disability (SSDI) and Retirement benefits on the same day, ensure the time slot used is for Disability, as it is a longer interview slot.
- If filing as a survivor, ensure the appointment is listed under the deceased's SSN and the appropriate person as the claimant.
- It is always recommended to provide proofs in person whenever possible. Should you have to use a mail carrier **ALWAYS** use tracking information for proof of delivery to SSA and write down what was sent.

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