



Calculators

Generate the proof points that help clients make informed decisions around tax planning, retirement planning, and more.

Featured Calculator

Introducing the Social Security Analyzer

Receive tailored estimates of the monthly, annual, and lifetime Social Security benefits your clients can expect throughout retirement. Download, fill out, and email the attached form to receive a specialized report comparing three potential claiming options and a recommendation for your client's optimal claiming strategy.

[Download the Form](#)[Email the Form](#)

Tax Planning

[How Much of My Social Security Benefit May Be Taxed?](#)

Use this calculator to determine how much of the Social Security benefit may be subject to income tax.

[Effective Tax Rate Estimator](#)

Federal income tax is calculated using a progressive tax structure, meaning that your effective tax rate is lower than your income tax bracket. As this calculator shows, even if taxable income shows you in a particular income tax bracket, overall, you benefit from being taxed at the lower brackets first.

