

# PRESS & MEDIA KIT



## *Social Security Advisors*

### *Mission Statement*

***“We help Americans maximize their Social Security benefits.”***

Social Security Advisors<sup>SM</sup> is an innovative financial and technology company with a single mission: to help its clients maximize their Social Security benefits. On average, retirees leave \$120,000 per couple of hard-earned Social Security benefits on the table due to a lack of quality, customized Social Security advice. We fill this void by delivering customized Social Security advice through our online software at [www.SocialSecurityAdvisors.com](http://www.SocialSecurityAdvisors.com) and through our highly-trained team of Social Security specialists. Social Security Advisors<sup>SM</sup> leverages expert knowledge to increase clients' Social Security benefits and simplify the complex claiming choices that retirees face. Clients receive a Maximum Social Security Strategy<sup>SM</sup> customized exclusively for them that explains exactly when and how to file for Social Security to maximize their benefits, plus expert advice and recommendations from their dedicated Social Security Advisor.



### **PRESS CONTACT**



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## WHAT WE DO



- We Maximize Benefits**  
We maximize our clients' Social Security by \$120,000, on average, per couple.
- We Make it Easy**  
We help our clients make the **best Social Security choice possible** based on their individual circumstances.
- Speak to an Expert**  
We offer access to a dedicated Social Security Advisor.
- Filing Made Easy**  
We tell clients when to file, what to file, & how to file.

## WHY MAXIMIZE?



- Larger Social Security Benefit
- Increased Standard of Living
- Financial Flexibility
- Financial Security
- Longevity Protection
- Survivor Benefits
- Inflation Protection
- Social Security is independent of the economy and the market. It's a stable source of cash indexed for inflation. Make sure to Maximize Your Benefits!

## PRICING PLANS



With over 9,200 different Social Security claiming options available, retirees are increasingly expecting and demanding strategic Social Security claiming advice. The Maximum Social Security Strategy<sup>SM</sup> from Social Security Advisors<sup>SM</sup> is an integral part of retirement planning. Every Maximum Social Security Strategy<sup>SM</sup> is customized to ensure clients receive the maximum amount of Social Security benefits that they are entitled to. In addition, each plan contains valuable information to help clients understand their Social Security benefits.

	A personalized report	×	×
	A personalized report	+	Multiple claiming scenarios
	A personalized report	+	Multiple claiming scenarios
		+	A dedicated Advisor

\*\*\* **DID YOU KNOW** \*\*\*  
Every year Americans forgo over \$25 billion in Social Security benefits because they don't maximize their benefits!







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## LEADERSHIP



### Catherine Azmoodeh, Co-Founder & Co-CEO



Catherine’s extensive experience in working at the intersection of government and finance has resulted in a unique and practical skill set that clients benefit from at Social Security Advisors<sup>SM</sup>. She is a trained economist, interested in creating efficiencies and identifying optimal solutions. Prior to founding Social Security Advisors<sup>SM</sup>, Catherine was an auditor at the Federal Reserve Bank of New York and at the Texas State Legislature. Catherine, a serial entrepreneur, founded The International Import-Export Group. She also has worked at Citibank and J.P. Morgan and held tenure at the Brookings Institution in Washington D.C. as an economics researcher. Catherine attended the University of Texas at Austin in the M.B.A. and M.P.A. programs; she also received a B.A. in economics, magna cum laude, from Tufts University, where she was a Centennial Scholar and pursued graduate coursework at the Fletcher School of Law and Diplomacy.

### Matthew Allen, Co-Founder & Co-CEO



As a serial entrepreneur, Matthew founded Social Security Advisors<sup>SM</sup> and has been at the forefront of financial services for over a decade and is driven by a passion for providing industry-leading advice to his clients. He realized that there was a major education and advice gap when it came to Social Security and was determined to fill this void. Matthew also founded The Universal Group of Companies, a private investment firm, in 2004. From 2000 to 2004, Matthew was a NYSE Market Maker with LaBranche & Co., a Fortune 500 New York Stock Exchange firm. Matthew was responsible for a variety of collaborative responsibilities including: investment analysis, economic analysis, and equities and fixed-income trading. Matthew actively participated as a market maker in several of the largest NYSE-listed equity and fixed-income securities including, but not limited to: American Express, Inc., Merck & Co., Inc., Altria Group, Inc., Morgan Stanley, The Gap Inc., and SBC Communications, Inc. Matthew has pursued advanced education in the areas of business, finance, law, and politics and has held the Series 65, Series 25, and Series 21 licenses and certifications and has been awarded the CFA Institute’s Certificate of Achievement.

## FACTS & FIGURES



The Social Security Administration is the largest government agency in the world. Every year, it distributes over **\$860 billion** in retirement, disability, and survivor benefits to over **59 million** Americans.



By law, the Social Security Administration is **prohibited** from providing advice.

**\$25B**

Every year Americans forgo over **\$25 billion** in Social Security benefits – especially spousal benefits, which most people don’t know about.



**76% of women and 71% of men** receive reduced Social Security benefits.



Social Security is the **largest source of income** for over half of retirees as well as their **largest asset**.



The Social Security handbook is thicker than the Bible. It contains over **2,728 rules**.



About **10,000 Americans retire each day!** Nearly **73 million** baby boomers will file for retirement in the next 20 years.

@Social\_Security

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## OUR STORIES



### Matt's Story

*Mom:* "Matt, when do I file for Social Security?"

*Matt:* "Having worked in finance for many years, my mother asked me what would be the best time for her to file for Social Security. I thought it would be simple to go through the Social Security Handbook to find an answer, but there were too many rules governing the Social Security Administration. After extensive research, I realized that there were strategies available to her to get her an extra \$130,000 in benefits. It was clear to me that this was a problem that many were facing as they retired and that there must be a better way. I co-founded Social Security Advisors to make Social Security easy and to help all Americans maximize their Social Security benefits."



### Catherine's Story

*Dad:* "You've worked in finance and government your whole career...what should I do about my Social Security?"

*Catherine:* "Like most Americans, my parents were simply going to claim their Social Security at 62. Because of my background in government and financial services, they asked me how to claim their benefits. When I looked into their situation further, I realized that by claiming at 62, they would have missed out on approximately \$175,000 in lifetime benefits. I couldn't believe how complicated Social Security is and if it was challenging for me with my background, I figured that thousands of Americans were struggling with the same thing. It was then that I realized I could not only help my parents, but the millions of Americans who also need help."

## WHAT CLIENTS SAY



Click Here to Watch a Client Testimonial Video:



"We paid \$125 to get an additional \$173,280 in lifetime benefits. It's an amazing deal and we would have made a big mistake without the help of Social Security Advisors. They are true experts who offer personalized advice."

-Thomas & Sandra S.



"I read about file and suspend, but had no idea when or how it worked until I spoke with my Advisor. I wouldn't have had the extra money without your help."

-Patricia K.



"I spent hours talking to the Social Security Administration and researching my options online and still didn't know what to do. It's amazing how easy you made it. You saved me so much time! Thank you!"

-Ken L.



## Thank You



Thank you for getting the word out that Americans are missing out on hard-earned Social Security benefits and that Social Security Advisors<sup>SM</sup> can help them maximize their benefits.