

Health Care Cost Assessment Fact Finder

Date: _____

Report type: Medicare costs only Medicare and long-term care costs Long-term care costs only

Investment Professional's Information			
First Name:	MI:	Last Name:	
Broker/Dealer:			
Email:	Phone:	Fax:	
Is this an advisor self-assessment? <input type="checkbox"/> Yes <input type="checkbox"/> No		Wholesaler name (if applicable):	

Client and Spouse/Partner Information Couples and partners sharing a household should complete all of the fields below, even if you are planning for only one spouse or partner. The assessment considers the availability of receiving care from a spouse or partner in determining the health care and long-term care cost estimate.

	First Name	Last Name	Gender	Current Age	Retirement Age	Retirement Location	
						State	Metro Region (see back for full list)
Client							
Spouse/ Partner							

Assessment Questions (Check Yes or No)	Client's Response	Spouse's/Partner's Response
If you plan to retire prior to age 65, will you need to purchase private health insurance?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Current health*		
Diagnosed with high blood pressure?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Diagnosed with high cholesterol?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Diagnosed with type 1 diabetes?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Diagnosed with type 2 diabetes?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Diagnosed with cardiovascular disease?	<input type="checkbox"/> Yes <input type="checkbox"/> No Years since diagnosis: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No Years since diagnosis: _____
Diagnosed with cancer?	<input type="checkbox"/> Yes <input type="checkbox"/> No Years since diagnosis: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No Years since diagnosis: _____
Diagnosed with multiple sclerosis?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Lifestyle & health history		
Currently a tobacco user?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Dependent on cane, walker or wheelchair?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Family history of diabetes or cardiovascular disease?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Annual Income in Retirement — Select the range that best fits your actual or estimated post-retirement income (not your income level before retirement.) Use your modified adjusted gross income (MAGI) and assume today's dollars. Your retirement income helps determine the cost for Medicare Parts B & D.

Married filing jointly: for married couples filing a joint tax return	Married filing separately: for married couples filing separate tax returns		Individual: for single persons filing an individual tax return	
	Client	Spouse/Partner	Individual 1	Individual 2
<input type="checkbox"/> \$170,000 or less	<input type="checkbox"/>	<input type="checkbox"/> \$85,000 or less	<input type="checkbox"/>	<input type="checkbox"/> \$85,000 or less
<input type="checkbox"/> \$170,001 to \$214,000	<input type="checkbox"/>	<input type="checkbox"/> \$85,001 to \$129,000	<input type="checkbox"/>	<input type="checkbox"/> \$85,001 to \$107,000
<input type="checkbox"/> \$214,001 to \$320,000	<input type="checkbox"/>	<input type="checkbox"/> more than \$129,001	<input type="checkbox"/>	<input type="checkbox"/> \$107,001 to \$160,000
<input type="checkbox"/> \$320,001 to \$428,000			<input type="checkbox"/>	<input type="checkbox"/> \$160,001 to \$214,000
<input type="checkbox"/> more than \$428,001			<input type="checkbox"/>	<input type="checkbox"/> more than \$214,001

Medicare Coverage — Choose from the following Medicare coverage options. **All Medicare premiums plus additional medical costs will be used as the default option if no other option is selected. Not required for LTC-only reports.**

Include Medicare parts A, B, & D plus supplemental insurance premiums and out-of-pocket expenses.	<input type="checkbox"/>
Include Medicare parts A, B & D plus supplemental insurance premiums only.	<input type="checkbox"/>
Include Medicare parts A, B & D only.	<input type="checkbox"/>
Include Medicare parts A & B only.	<input type="checkbox"/>

NATIONWIDE USE ONLY	<input type="checkbox"/> RLC	<input type="checkbox"/> NFN	<input type="checkbox"/> BGA	<input type="checkbox"/> Institute	<input type="checkbox"/> Other
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* Assessment is not designed for persons already diagnosed with Alzheimer's, Parkinson's or other disqualifying conditions.

Metro Regions will be used to determine long-term care costs. If your retirement metro region is not listed, please indicate state average.

Alaska

Anchorage
AK State Average

Alabama

Birmingham-Hoover
AL State Average

Arkansas

Little Rock-N. Little Rock
AR State Average

Arizona

Phoenix-Mesa-Glendale
Tucson
AZ State Average

California

Bakersfield-Delano
Fresno
Los Angeles County
Oxnard-Thousand Oaks
Riverside-San Bernardino
Sacramento-Arden-Arcade
San Diego-Carlsbad
San Francisco
San Jose-Sunnyvale
Stockton
CA State Average

Colorado

Colorado Springs
Denver-Aurora
CO State Average

Connecticut

Bridgeport-Stamford
Hartford-West Hartford
New Haven-Milford
CT State Average

Delaware

Dover
DE State Average

District of Columbia

Washington-Arlington

Florida

Jacksonville
Lakeland-Winter Haven
Miami-Fort Lauderdale
North Port-Bradenton
Orlando-Kissimmee
Tampa-St. Petersburg
FL State Average

Georgia

Atlanta-Sandy Springs
GA State Average

Hawaii

Honolulu
HI State Average

Iowa

Des Moines-West D.M.
IA State Average

Idaho

Boise City-Nampa
ID State Average

Illinois

Chicago-Joliet
IL State Average

Indiana

Indianapolis-Carmel
IN State Average

Kansas

Wichita
KS State Average

Kentucky

Louisville/Jefferson Co.
KY State Average

Louisiana

Baton Rouge
New Orleans-Metairie
LA State Average

Massachusetts

Boston-Cambridge-Quincy
Springfield
Worcester
MA State Average

Maryland

Baltimore-Towson
MD State Average

Maine

Portland-South Portland
ME State Average

Michigan

Detroit-Warren-Livonia
Grand Rapids-Wyoming
MI State Average

Minnesota

Minneapolis-St. Paul
MN State Average

Missouri

Kansas City
St. Louis
MO State Average

Mississippi

Jackson
MS State Average

Montana

Billings
MT State Average

North Carolina

Charlotte-Gastonia
Greensboro-High Point
Raleigh-Cary
NC State Average

North Dakota

Fargo
ND State Average

Nebraska

Omaha-Council Bluffs
NA State Average

New Hampshire

Manchester
NH State Average

New Jersey

Northern New Jersey
NJ State Average

New Mexico

Albuquerque
NM State Average

Nevada

Las Vegas-Paradise
NV State Average

New York

Albany-Schenectady-Troy
Bronx
Brooklyn
Buffalo-Niagara Falls
Long Island
Manhattan
NY Outer City Area
Poughkeepsie-Newburgh
Queens
Rochester
Staten Island
Syracuse
NY State Average

Ohio

Akron
Cincinnati-Middletown
Cleveland-Elyria
Columbus
Dayton
Toledo
OH State Average

Oklahoma

Oklahoma City
Tulsa
OK State Average

Oregon

Portland-Vancouver
OR State Average

Pennsylvania

Allentown-Bethlehem
Philadelphia-Camden
Pittsburgh
PA State Average

Rhode Island

Providence-New Bedford
RI State Average

South Carolina

Charleston-N. Charleston
Columbia
Greenville-Mauldin
SC State Average

South Dakota

Sioux Falls
SD State Average

Tennessee

Knoxville
Memphis
Nashville-Davidson
TN State Average

Texas

Austin-Round Rock
Dallas-Fort Worth
El Paso
Houston-Sugar Land
McAllen-Edinburg
San Antonio-New Braunfels
TX State Average

Utah

Salt Lake City
UT State Average

Virginia

Richmond
Virginia Beach
VA State Average

Vermont

Burlington-South Burlington
VT State Average

Washington

Seattle-Tacoma-Bellevue
WA State Average

Wisconsin

Milwaukee-Waukesha
WI State Average

West Virginia

Charleston
WV State Average

Wyoming

Cheyenne
WY State Average



• Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution
• Not insured by any federal government agency • May lose value

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