



Nationwide®

RAYMOND JAMES®

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Complete this form and have your advisor return it to the Retirement Institute Income Planning Team.

Have questions? Call 1-877-245-0763

Health Care/LTC Cost Assessment Fact Finder

Wholesaler name: _____ Meeting reference: Boston College Webinar

Report type requested: Medicare costs only Long-term care costs only Both

REPORT REQUESTED BY:		<input type="checkbox"/> BROKER/DEALER	<input type="checkbox"/> BGA	<input type="checkbox"/> IMO	<input type="checkbox"/> RIA
First Name: <u>Sean</u>	Last Name: <u>Cavanaugh</u>				
Firm/BGA/IMO Name: <u>Raymond James</u>	Phone: <u>(877) 462-2011</u>				
Send Report To (Email): <u>sean.cavanaugh@raymondjames.com</u>					

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(s)	
						State(s)	Metro region(s) (see back for full list)
Client							
Spouse/ Partner							

Assessment questions *Check Yes or No*

If you plan to retire prior to age 65, will you need to purchase private health insurance? Yes No

CURRENT HEALTH *Assessment is not designed for persons already diagnosed with Alzheimer's, Parkinson's or other disqualifying conditions.*

Assessment questions	Client's response	Spouse's/partner's response
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: 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 (select only one option)

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"/>

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
NE 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



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