Complete this form and have your advisor return it to the Retirement Institute Income Planning Team.
IPLNDESK@nationwide.com
Fax: 1-855-256-4220

Have questions? Call 1-877-245-0763

Health Care/LTC Cost Assessment Fact Finder

Wholesaler name:______________________ Meeting reference:______________________

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

REPORT REQUESTED BY:	☐ BROKER/DEALER ☐ BGA ☐ IMO ☐ RIA
First Name:	Last Name:
Firm/BGA/IMO Name:	Phone:
Send Report To (Email):	Address (Street, City, State, Zip Code):

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)	City* (Cities)	County
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?	☐ Yes ☐ No	☐ Yes ☐ No
CURRENT HEALTH *Assessment is not designed for persons already diagnosed with Alzheimer's, Parkinson's or other disqualifying conditions.*		
Diagnosed with high blood pressure?	☐ Yes ☐ No	☐ Yes ☐ No
Diagnosed with high cholesterol?	☐ Yes ☐ No	☐ Yes ☐ No
Diagnosed with type 1 diabetes?	☐ Yes ☐ No	☐ Yes ☐ No
Diagnosed with type 2 diabetes?	☐ Yes ☐ No	☐ Yes ☐ No
Diagnosed with cardiovascular disease?	☐ Yes ☐ No Years since diagnosis:__________	☐ Yes ☐ No Years since diagnosis:__________
Diagnosed with cancer?	☐ Yes ☐ No Years since diagnosis:__________	☐ Yes ☐ No Years since diagnosis:__________
Diagnosed with multiple sclerosis?	☐ Yes ☐ No	☐ Yes ☐ No
LIFESTYLE & HEALTH HISTORY		
Currently a tobacco user?	☐ Yes ☐ No	☐ Yes ☐ No
Dependent on cane, walker or wheelchair?	☐ Yes ☐ No	☐ Yes ☐ No
Family history of diabetes or cardiovascular disease?	☐ Yes ☐ No	☐ Yes ☐ 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	**Individual:** for single persons filing an individual tax return Individual 1	Individual 2	
☐ $170,000 or less	☐	☐	$85,000 or less
☐ $170,001 to $214,000	☐	☐	$85,001 to $107,000
☐ $214,001 to $267,000	☐	☐	$107,001 to $133,500
☐ $267,001 to $320,000	☐	☐	$133,501 to $160,000
☐ $320,001 to $749,999	☐	☐	$160,001 to $499,999
☐ more than $750,000	☐	☐	more than $500,000

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.	☐
Include Medicare parts A, B & D plus supplemental insurance premiums only.	☐
Include Medicare parts A, B & D only.	☐

* City/metro data will be used if available, if unavailable state-wide averages will be used.

Nationwide®
is on your side

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

Please keep in mind that the estimates resulting from this fact finder are for hypothetical purposes only and are not a guarantee.

The information collected on this fact finder will be kept confidential and used to provide an estimate of your potential health care costs in retirement. For more information on how Nationwide protects your personal information, visit our online privacy policy at http://www.nationwide.com/privacy-security.jsp.

This material is not a recommendation to buy, sell, hold or roll over any asset, adopt an investment strategy, retain a specific investment manager or use a particular account type. It does not take into account the specific investment objectives, tax and financial condition or particular needs of any specific person. Investors should work with their financial professional to discuss their specific situation.

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