



Nationwide®

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

Table with columns: REPORT REQUESTED BY: BROKER/DEALER BGA IMO RIA. Rows include: 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.

Table with columns: First Name, Last Name, Gender, Current Age, Retirement Age, Retirement Location(s) (State(s), City*, County). Rows for Client and Spouse/Partner.

Assessment questions Check Yes or No Client's response Spouse's/partner's response

Table with columns: Assessment questions, Client's response (Yes/No), Spouse's/partner's response (Yes/No). Rows include: If you plan to retire prior to age 65, will you need to purchase private health insurance? CURRENT HEALTH (Diagnosed with high blood pressure, high cholesterol, type 1/2 diabetes, cardiovascular disease, cancer, multiple sclerosis).

LIFESTYLE & HEALTH HISTORY

Table with columns: Question, Client's response (Yes/No), Spouse's/partner's response (Yes/No). Rows: Currently a tobacco user?, Dependent on cane, walker or wheelchair?, Family history of diabetes or cardiovascular disease?

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.

Table with columns: Married filing jointly: married couples filing a joint tax return, Individual: for single persons filing an individual tax return (Individual 1, Individual 2). Rows show income brackets from \$174,000 or less to more than \$750,000.

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.

Table with columns: Option, Selection box. Rows: 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.



• 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.

Nationwide Investment Services Corporation (NISC), member FINRA, Columbus, OH. Nationwide Retirement Institute is a division of NISC.

Nationwide, the Nationwide N and Eagle, Nationwide Retirement Institute and Nationwide is on your side are service marks of Nationwide Mutual Insurance Company. © 2020 Nationwide

NFM-10987AO.12 (01/20)