



Nationwide®

Complete this form and have your financial professional return it to the Retirement Institute Planning Team.
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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.

Table with columns: First Name, Last Name, Sex, 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 assessment questions: 'If you plan to retire prior to age 65, will you need to purchase private health insurance?', 'CURRENT HEALTH' (Diagnosed with high blood pressure, cholesterol, diabetes, cardiovascular disease, cancer, multiple sclerosis), and 'LIFESTYLE AND HEALTH HISTORY' (tobacco user, cane/walker/wheelchair, family history).

LIFESTYLE AND HEALTH HISTORY

Table with 3 rows: 'Currently a tobacco user?', 'Dependent on a 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: Filing status (Married filing jointly, Individual), Income ranges (\$182,000 or less to \$750,000 or above), and corresponding Medicare Part B & D costs.

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 3 rows of Medicare coverage options: 'Include Medicare parts A, B and D, plus supplemental insurance premiums and out-of-pocket expenses.', 'Include Medicare parts A, B and D, plus supplemental insurance premiums only.', 'Include Medicare parts A, B and D only.'

* City/metro data will be used if available; otherwise, statewide 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

This material is not a recommendation to buy or sell a financial product or to adopt an investment strategy. Investors should discuss their specific situation with their financial professional.

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 nationwide.com/privacy-security.jsp.

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