

LTC Assessment Fact Finder

# Use this form to assess your client’s needs for long term care insurance.

# To start the long-term care conversation, use this map to show your clients [what care costs](https://whatcarecosts.com) by state. Use “Lincoln” for your sponsor code.

|  |  |
| --- | --- |
| Advisor information |  |
| Advisor First Name: Click or tap here to enter text. | Last Name: Click or tap here to enter text. |
| Advisor Email: Click or tap here to enter text. | Advisor Phone: Click or tap here to enter text. |
| Email completed form to your CIC Brokerage Manager or jdevlin@coastalic.com |

|  |
| --- |
| Client and spouse/partner information |
| *Couples and partners sharing a household should complete all 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 | Sex | Current Age | Retirement Age | Retirement Location(s) |
| State(s) | City\* (Cities) | County |
| Client | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| SpousePartner | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |

|  |  |  |  |
| --- | --- | --- | --- |
| 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 AND HEALTH HISTORY |
| Currently a tobacco user? |  Yes [ ]  | No [ ]  |  Yes [ ]  | No [ ]  |
| Dependent on a 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* |
| Married filing jointly: married couples filing a joint tax return | Individual: for single persons filing an individual tax returnIndividual 1 Individual 2 |
|  |  |  | Individual 1 | Individual 2 |
| $182,000 or less | [ ]  | $91,000 or less | [ ]  | [ ]  |
| $182,001 to $228,000 | [ ]  | $91,001 to $114,000 | [ ]  | [ ]  |
| $228,001 to $284,000 | [ ]  | $114,001 to $142,000 | [ ]  | [ ]  |
| $284,001 to $340,000 | [ ]  | $142,001 to $170,000 | [ ]  | [ ]  |
| $340,001 to $749,999 | [ ]  | $170,001 to $499,999 | [ ]  | [ ]  |
| $750,000 or above | [ ]  | $500,000 or above | [ ]  | [ ]  |

|  |
| --- |
| Additional information relevant to long term care needs |
| Click or tap here to enter text. |

# Nationwide is on your

* 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.

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

Nationwide, the Nationwide N and Eagle, Nationwide is on your side and Nationwide Retirement Institute are service marks of Nationwide Mutual Insurance Company. © 2022 Nationwide

NFM-10987AO.14 (02/22)