

Long Term Care Suitability by _____ on ____/____/____

Name: _____ DOB ____/____/____ (M/F) Age: ____ Tobacco ____ Ht ____ Wt ____

Name: _____ DOB ____/____/____ (M/F) Age: ____ Tobacco ____ Ht ____ Wt ____

Child / DOB _____ Child / DOB _____

Child / DOB _____ Child / DOB _____

Address: _____ City: _____ State: ____ Zip: ____ County: _____

Phone: (H) _____ (W): _____ (C): _____ (Email): _____

Value of Primary Residence: _____ Existing Mortgage: _____

Do you have a Medicare Plan or Employer Plan? _____ Enrolled @ 65? _____

How do you currently pay for your health Insurance? _____

Existing Insurance Coverage

Life Insurance? Y N Company _____ Face Amt _____ LTC Rider? Y N

Final Expense / Burial Plan? Y N Company _____ Face Amt: _____

Long Term Care / Home Health Care? Y N Company: _____

Monthly Income

Social Security: _____ + _____ = _____

Pension: _____ + _____ = _____

Wages / Salary _____ + _____ = _____

Interest / Dividends _____

Annuity (If currently using for living expenses) _____

IRA (If currently using for living expenses) _____

Other Property / Business: Value _____ Income: _____

Total: _____

Liquid Assets

C.D's Bank: _____ Int. Rate: _____ Renewal Date: _____ \$ _____

Equities: Stocks, Bonds, Mutual Funds _____

Savings, Money Market _____

Checking _____

Cash Value Life Insurance _____

Annuities _____

Total: _____

Have you transferred any assets in the last 60 months? Y N _____

Do you have a will? Y N Do you have a Trust? Y N Do you have a P.O. A.? Y N

If one of you needed care at a cost of \$50,000 per year, can you pay for it out of your current income? Y N If no, how would you pay for it? _____

Have you thought about who could provide health care for you in your own home?

Have you ever discussed LTC with your children? Y N

Are you familiar with how Medicare pays for nursing home care? Y N

Are you familiar with the process of applying for Medicaid (Title 19) ? Y N

Plan Preferences

What do you like a Long Term Care plan to do for you?

Pay cash for care Keep you at home Protect life savings Allow for Inheritance

