

# Health Care Cost Assessment Fact Finder (Confidential)







#### WEALTH PLANNING FOR AVIATION PROFESSIONALS

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This publication is designed for informational purposes and Financial Planning data gathering purposes only.

For a complete informational guide to MediCare, please visit : www.medicare.gov

#### What Is Medicare? –

Medicare is health insurance for people 65 or older, people under 65 with certain disabilities, and people of any age with End-Stage Renal Disease (ESRD) (permanent kidney failure requiring dialysis or a kidney transplant).

## Part A (Hospital Insurance) —

Inpatient care in a hospital Inpatient care in a skilled nursing facility (not custodial or long-term care) Hospice care Home health care Inpatient care in a religious nonmedical health care institution

#### Part B (Medical Insurance) —

Services from doctors and other health care providers Outpatient care Home health care Durable medical equipment Many preventive services

## – Part C (Medicare Advantage) ———

Includes all benefits and services covered under Parts A and B Usually includes Medicare prescription drug coverage (Part D) as part of the plan Run by Medicare-approved private insurance companies that follow rules set by Medicare May include extra benefits and services that aren't covered by Original Medicare, sometimes for an extra cost.

## Part D (Medicare Prescription Drug Coverage) —

Includes all benefits and services covered under Parts A and B Usually includes Medicare prescription drug coverage (Part D) as part of the plan Run by Medicare-approved private insurance companies that follow rules set by Medicare May include extra benefits and services that aren't covered by Original Medicare, sometimes for an extra cost.





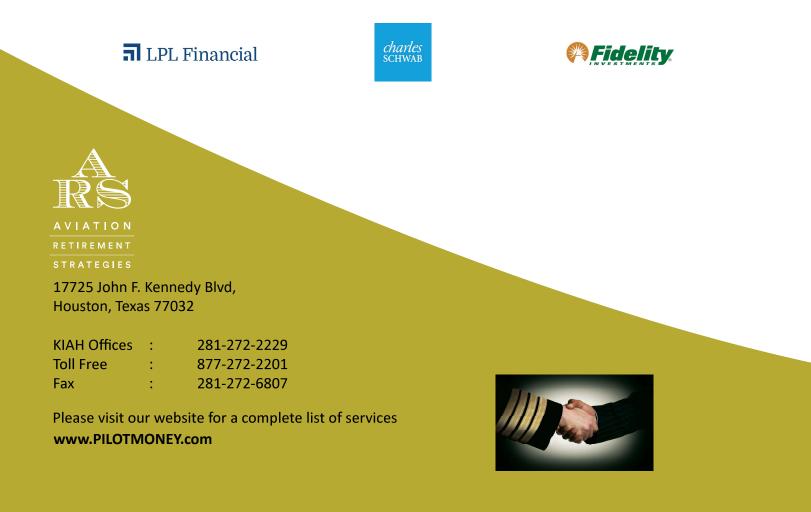
Medicare Costs Only			Medicare Costs & Long Term Care		
Assessment Questions		u	Spouse		
If retiring prior to age 65, will you need Private Health Insurance?	Yes	No	Yes	No	
Current Health		ou	Spouse		
	Yes	No	Yes	No	
Diagnosed with high Blood Pressure?					
Diagnosed with high cholesterol?					
Diagnosed with Type 1 Diabetes?					
Diagnosed wtih Type 2 Diabetes?					
Diagnosed with Cardiovascular Disease?					
Diagnosed with Cancer					
Diagnosed with Multiple Sclerosis?					
Lifestyle & Health History		ou	Spouse		
Current Tobacco User?	Yes	No	Yes	No	
Dependent on Cane, Walker, or Wheelchair?					
Family History of Diabetes or Cardiovascular Disease?					
Annual Income In Retirement - This help in determining the cost POST-Retirement Estimated Income, NOT your current income. Also, please use t				range for your	
Married Filing Jointly Married Filing Seperatley		Inc	dividual Filing S	ingle	
\$170,000 or Less \$85,000 or Less			\$85,00	0 or Less	
\$170,001 to \$214,000 \$85,001 to \$129,0	00		\$85,00	1 to \$107,000	
\$214,001 to \$320,000 More than \$129,0	More than \$129,001		\$107,001 to \$160,000		
\$320,000 to \$428,000			\$160,0	01 to \$214,000	
More than \$428,001			More t	han \$214,001	
Include Medicare parts A, B, & D plus suppplemental insurance premiun Include Medicare parts A, B, & D plus suppplemental insurance premiun Include Medicare parts A, B, & D only		-of-pocket exp	enses.		







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