



AVIATION  
RETIREMENT  
STRATEGIES

## Health Care Cost Assessment Fact Finder (Confidential)

A composite image with a curved, olive-green border. The left side shows a close-up of a jet engine from an airplane, looking out over a sea of white clouds. The right side shows a man with glasses and a green shirt, smiling and looking up, holding a small wooden airplane. A young boy is next to him, also smiling and looking up, holding the tail of the wooden airplane.

“Building  
Confidence  
For Life”



*Retirement*  
**FLIGHT PLANNING**®



## Health Care Cost Assessment Fact Finder

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](http://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.

### Report Type

☐ Medicare Costs Only
 ☐ Long-Term Care Costs Only
 ☐ Medicare Costs & Long Term Care Costs

### Assessment Questions

You

Spouse

Yes

No

Yes

No

If retiring prior to age 65, will you need Private Health Insurance?

☐
☐
☐
☐

### Current Health

You

Spouse

Yes

No

Yes

No

Diagnosed with high Blood Pressure?

☐
☐
☐
☐

Diagnosed with high cholesterol?

☐
☐
☐
☐

Diagnosed with Type 1 Diabetes?

☐
☐
☐
☐

Diagnosed with Type 2 Diabetes?

☐
☐
☐
☐

Diagnosed with Cardiovascular Disease?

☐
☐
☐
☐

Diagnosed with Cancer

☐
☐
☐
☐

Diagnosed with Multiple Sclerosis?

☐
☐
☐
☐

### Lifestyle & Health History

You

Spouse

Yes

No

Yes

No

Current Tobacco User?

☐
☐
☐
☐

Dependent on Cane, Walker, or Wheelchair?

☐
☐
☐
☐

Family History of Diabetes or Cardiovascular Disease?

☐
☐
☐
☐

**Annual Income In Retirement** - This help in determining the costs for Medicare Part B & D. Please use the range for your POST-Retirement Estimated Income, **NOT** your current income. Also, please use the value in TODAY's dollars.

#### Married Filing Jointly

- ☐ \$170,000 or Less  
☐ \$170,001 to \$214,000  
☐ \$214,001 to \$320,000  
☐ \$320,000 to \$428,000  
☐ More than \$428,001

#### Married Filing Separately

- ☐ ☐ \$85,000 or Less  
☐ ☐ \$85,001 to \$129,000  
☐ ☐ More than \$129,001

#### Individual Filing Single

- ☐ ☐ \$85,000 or Less  
☐ ☐ \$85,001 to \$107,000  
☐ ☐ \$107,001 to \$160,000  
☐ ☐ \$160,001 to \$214,000  
☐ ☐ More than \$214,001

- ☐ 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  
☐ Include Medicare parts A, B, only

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[www.PILOTMONEY.com](http://www.PILOTMONEY.com)



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