Health Care Planner

Name Husband _____ Wife _____
Date of birth Husband _____ Wife _____
Age on nearest birthday Husband _____ Wife _____
Still working? Husband: Y N Wife: Y N
Expected date of retirement Husband _____ Wife _____

Current health insurance:

Husband	Wife	
		Employer plan that covers 20 or more employees
		Employer plan that covers fewer than 20 employees
		Retiree plan
		Individual health insurance policy
		COBRA
		Other

Health insurance after age 65:

Husband	Wife	
		Employer plan that covers 20 or more employees
		Medicare + employer plan that covers fewer than 20 employees
		Medicare + retiree plan
		Medicare + Medigap and Part D plan or Medicare Advantage
		Other

Health status (1-5, 5=excellent) Husband _____ Wife _____
Life expectancy Husband _____ Wife _____
Health care usage:
Number of annual doctor visits Husband _____ Wife _____
Annual drug costs Husband _____ Wife _____
Income for Part B premium – last 2 years' tax returns
Year _____Adjusted gross income + tax exempt interest $_____
Year _____Adjusted gross income + tax exempt interest $_____
Current income (joint)
Work $_____
Pensions $_____
Investments $_____
Other $_____
Total income $_____
Assets
Retirement accounts $_____
Savings and investment accounts $_____
Real estate not including home $_____
Other $_____
Total Assets $_____