



Nationwide®

Complete this form and return to the Participant Solutions Center:

INVESTNW@nationwide.com

Fax: 1-888-807-2140 • Phone: 1-866-975-6363

# Health Care Cost Assessment Fact Finder

Retirement Specialist: \_\_\_\_\_ Plan Sponsor/Employer : \_\_\_\_\_

PARTICIPANT CONTACT INFORMATION		
First Name:	Last Name:	
Email:	Phone:	Fax:
I would like to review the Health Care Cost Assessment results with a licensed Nationwide representative: <input type="checkbox"/> Yes <input type="checkbox"/> No		

Participant and spouse/partner information							
<i>Couples and partners sharing a household should complete all of the 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.</i>							
	First Name	Last Name	Gender	Current Age	Retirement Age	Retirement Location(s)	
						State(s)	Metro region(s) (see back for full list)
Client							
Spouse/ Partner							

Assessment questions <i>Check Yes or No</i>	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?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>CURRENT HEALTH</b> <i>Assessment is not designed for persons already diagnosed with Alzheimer's, Parkinson's or other disqualifying conditions.</i>		
Diagnosed with high blood pressure?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Diagnosed with high cholesterol?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Diagnosed with type 1 diabetes?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Diagnosed with type 2 diabetes?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Diagnosed with cardiovascular disease?	<input type="checkbox"/> Yes <input type="checkbox"/> No Years since diagnosis: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No Years since diagnosis: _____
Diagnosed with cancer?	<input type="checkbox"/> Yes <input type="checkbox"/> No Years since diagnosis: _____	<input type="checkbox"/> Yes <input type="checkbox"/> No Years since diagnosis: _____
Diagnosed with multiple sclerosis?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

LIFESTYLE & HEALTH HISTORY		
Currently a tobacco user?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Dependent on cane, walker or wheelchair?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Family history of diabetes or cardiovascular disease?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Annual income in retirement		
<i>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. Your retirement income helps determine the cost for Medicare Parts B &amp; D.</i>		
Married filing jointly: married couples filing a joint tax return	Married filing separately: for married couples filing separate tax returns Client Spouse/Partner	Individual: for single persons filing an individual tax return Individual 1 Individual 2
<input type="checkbox"/> \$170,000 or less	<input type="checkbox"/> <input type="checkbox"/> \$85,000 or less	<input type="checkbox"/> <input type="checkbox"/> \$85,000 or less
<input type="checkbox"/> \$170,001 to \$214,000	<input type="checkbox"/> <input type="checkbox"/> \$85,001 to \$129,000	<input type="checkbox"/> <input type="checkbox"/> \$85,001 to \$107,000
<input type="checkbox"/> \$214,001 to \$320,000	<input type="checkbox"/> <input type="checkbox"/> more than \$129,001	<input type="checkbox"/> <input type="checkbox"/> \$107,001 to \$160,000
<input type="checkbox"/> \$320,001 to \$428,000		<input type="checkbox"/> <input type="checkbox"/> \$160,001 to \$214,000
<input type="checkbox"/> more than \$428,001		<input type="checkbox"/> <input type="checkbox"/> more than \$214,001

Medicare coverage (select only one option)	
<i>All Medicare premiums plus additional medical costs will be used as the default option if no other option is selected. Not required for LTC-only reports.</i>	
Include Medicare parts A, B, & D plus supplemental insurance premiums and out-of-pocket expenses.	<input type="checkbox"/>
Include Medicare parts A, B & D plus supplemental insurance premiums only.	<input type="checkbox"/>
Include Medicare parts A, B & D only.	<input type="checkbox"/>
Include Medicare parts A & B only.	<input type="checkbox"/>

**Metro Regions** will be used to determine long-term care costs. If your retirement metro region is not listed, please indicate state average.

**Alaska**

Anchorage  
AK State Average

**Alabama**

Birmingham-Hoover  
AL State Average

**Arkansas**

Little Rock-N. Little Rock  
AR State Average

**Arizona**

Phoenix-Mesa-Glendale  
Tucson  
AZ State Average

**California**

Bakersfield-Delano  
Fresno  
Los Angeles County  
Oxnard-Thousand Oaks  
Riverside-San Bernardino  
Sacramento-Arden-Arcade  
San Diego-Carlsbad  
San Francisco  
San Jose-Sunnyvale  
Stockton  
CA State Average

**Colorado**

Colorado Springs  
Denver-Aurora  
CO State Average

**Connecticut**

Bridgeport-Stamford  
Hartford-West Hartford  
New Haven-Milford  
CT State Average

**Delaware**

Dover  
DE State Average

**District of Columbia**

Washington-Arlington

**Florida**

Jacksonville  
Lakeland-Winter Haven  
Miami-Fort Lauderdale  
North Port-Bradenton  
Orlando-Kissimmee  
Tampa-St. Petersburg  
FL State Average

**Georgia**

Atlanta-Sandy Springs  
GA State Average

**Hawaii**

Honolulu  
HI State Average

**Iowa**

Des Moines-West D.M.  
IA State Average

**Idaho**

Boise City-Nampa  
ID State Average

**Illinois**

Chicago-Joliet  
IL State Average

**Indiana**

Indianapolis-Carmel  
IN State Average

**Kansas**

Wichita  
KS State Average

**Kentucky**

Louisville/Jefferson Co.  
KY State Average

**Louisiana**

Baton Rouge  
New Orleans-Metairie  
LA State Average

**Massachusetts**

Boston-Cambridge-Quincy  
Springfield  
Worcester  
MA State Average

**Maryland**

Baltimore-Towson  
MD State Average

**Maine**

Portland-South Portland  
ME State Average

**Michigan**

Detroit-Warren-Livonia  
Grand Rapids-Wyoming  
MI State Average

**Minnesota**

Minneapolis-St. Paul  
MN State Average

**Missouri**

Kansas City  
St. Louis  
MO State Average

**Mississippi**

Jackson  
MS State Average

**Montana**

Billings  
MT State Average

**North Carolina**

Charlotte-Gastonia  
Greensboro-High Point  
Raleigh-Cary  
NC State Average

**North Dakota**

Fargo  
ND State Average

**Nebraska**

Omaha-Council Bluffs  
NE State Average

**New Hampshire**

Manchester  
NH State Average

**New Jersey**

Northern New Jersey  
NJ State Average

**New Mexico**

Albuquerque  
NM State Average

**Nevada**

Las Vegas-Paradise  
NV State Average

**New York**

Albany-Schenectady-Troy  
Bronx  
Brooklyn  
Buffalo-Niagara Falls  
Long Island  
Manhattan  
NY Outer City Area  
Poughkeepsie-Newburgh  
Queens  
Rochester  
Staten Island  
Syracuse  
NY State Average

**Ohio**

Akron  
Cincinnati-Middletown  
Cleveland-Elyria  
Columbus  
Dayton  
Toledo  
OH State Average

**Oklahoma**

Oklahoma City  
Tulsa  
OK State Average

**Oregon**

Portland-Vancouver  
OR State Average

**Pennsylvania**

Allentown-Bethlehem  
Philadelphia-Camden  
Pittsburgh  
PA State Average

**Rhode Island**

Providence-New Bedford  
RI State Average

**South Carolina**

Charleston-N. Charleston  
Columbia  
Greenville-Mauldin  
SC State Average

**South Dakota**

Sioux Falls  
SD State Average

**Tennessee**

Knoxville  
Memphis  
Nashville-Davidson  
TN State Average

**Texas**

Austin-Round Rock  
Dallas-Fort Worth  
El Paso  
Houston-Sugar Land  
McAllen-Edinburg  
San Antonio-New Braunfels  
TX State Average

**Utah**

Salt Lake City  
UT State Average

**Virginia**

Richmond  
Virginia Beach  
VA State Average

**Vermont**

Burlington-South Burlington  
VT State Average

**Washington**

Seattle-Tacoma-Bellevue  
WA State Average

**Wisconsin**

Milwaukee-Waukesha  
WI State Average

**West Virginia**

Charleston  
WV State Average

**Wyoming**

Cheyenne  
WY State Average



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 <http://www.nationwide.com/privacy-security.jsp>.

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