



Member Information

NAME _____ DATE OF APPT _____

PRODUCT(S) DISCUSSED _____

Health Insurance

CURRENT HEALTH PLAN _____ MONTHLY PREMIUM _____

DEDUCTIBLE/OUT-OF-POCKET _____ DR/HOSPITAL COPAYS _____

RX COVERAGE _____

Start the Conversation

WHAT ARE YOUR BIGGEST CONCERNS REGARDING YOUR HEALTH OVER THE NEXT 10 YEARS?

FINAL EXPENSE

Have you ever had to plan a funeral?

How do you plan on paying for your funeral costs?

How much does social security pay towards funeral costs?
(\$255 one-time) *Average cost of a funeral is \$10,000*

HOSPITAL INDEMNITY

How do you plan to pay for your hospital deductibles and co-payments?
Great for Medicare advantage, high deductible Plan F, individual plans With high deductibles

CANCER INSURANCE

Have you had any experience with friends or family who have Had cancer?

How does your current plan cover the costs of cancer?

60% of all cancer costs are not covered by health insurance
Ex. Cancer facility in-network, experimental treatment, travel costs, cancer drugs, etc.

SHORT TERM CARE

Do you know someone who needed care in a nursing home Or assisted living facility?

How do you plan on paying for recovery care?
Average stay in a nursing home is 388 days. Medicare does not pay for LTC or custodial care

DENTAL INSURANCE

How are you planning to pay for dental services?

How does your current plan cover dental care?
Medicare does not cover routine dental. 77% of people 65+ have visited the dentist in 5 years.

Notes
