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: ☐ Yes   ☐ No

Participant and spouse/partner information

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.

	First Name	Last Name	Gender	Current Age	Retirement Age	Retirement Location(s) State(s)	Retirement Location(s) Metro region(s) (see back for full list)
Client							
Spouse/ Partner							

Assessment questions *Check Yes or No*

Assessment questions *Check Yes or No*	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?	☐ Yes ☐ No	☐ Yes ☐ No
CURRENT HEALTH *Assessment is not designed for persons already diagnosed with Alzheimer's, Parkinson's or other disqualifying conditions.*		
Diagnosed with high blood pressure?	☐ Yes ☐ No	☐ Yes ☐ No
Diagnosed with high cholesterol?	☐ Yes ☐ No	☐ Yes ☐ No
Diagnosed with type 1 diabetes?	☐ Yes ☐ No	☐ Yes ☐ No
Diagnosed with type 2 diabetes?	☐ Yes ☐ No	☐ Yes ☐ No
Diagnosed with cardiovascular disease?	☐ Yes ☐ No Years since diagnosis:_____	☐ Yes ☐ No Years since diagnosis:_____
Diagnosed with cancer?	☐ Yes ☐ No Years since diagnosis:_____	☐ Yes ☐ No Years since diagnosis:_____
Diagnosed with multiple sclerosis?	☐ Yes ☐ No	☐ Yes ☐ No
LIFESTYLE & HEALTH HISTORY		
Currently a tobacco user?	☐ Yes ☐ No	☐ Yes ☐ No
Dependent on cane, walker or wheelchair?	☐ Yes ☐ No	☐ Yes ☐ No
Family history of diabetes or cardiovascular disease?	☐ Yes ☐ No	☐ Yes ☐ No

Annual income in retirement

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 & D.

Married filing jointly: married couples filing a joint tax return	**Married filing separately:** for married couples filing separate tax returns			**Individual:** for single persons filing an individual tax return		
	Client	Spouse/Partner		Individual 1	Individual 2	
☐ $170,000 or less	☐	☐	$85,000 or less	☐	☐	$85,000 or less
☐ $170,001 to $214,000	☐	☐	$85,001 to $129,000	☐	☐	$85,001 to $107,000
☐ $214,001 to $320,000	☐	☐	more than $129,001	☐	☐	$107,001 to $160,000
☐ $320,001 to $428,000				☐	☐	$160,001 to $214,000
☐ more than $428,001				☐	☐	more than $214,001

Medicare coverage *(select only one option)*

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.

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.	☐

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

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