



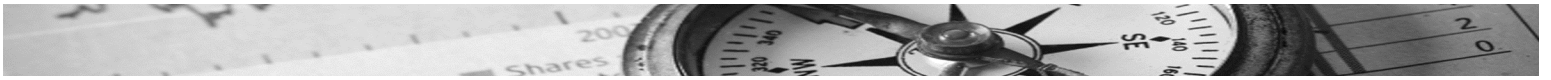
FINANCIAL AND INSURANCE SOLUTIONS

Income Planning for Women

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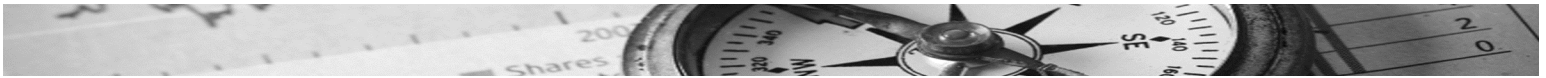
Long-Term Care Planning Checklist



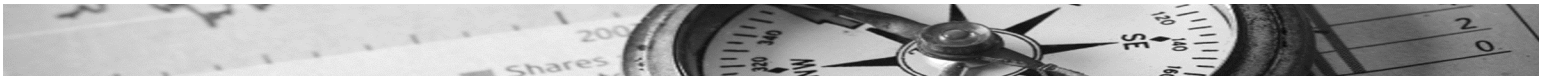


Long-Term Care Planning Checklist

General information	Yes	No	N/A
1. Has relevant personal information been gathered? • Name • Date of birth • Legal state of residence • Health status, including medications being taken • Marital status • Family members available for support • Name, phone number, and address of attorney, physician, geriatric care manager or other advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has financial situation been assessed? • Income from Social Security, pension, employment, or other source • Expenses • Assets • Liabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
Long-term care planning	Yes	No	N/A
1. Is the need for long-term care imminent?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Are assets sufficient to cover long-term care needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Have ways to fund long-term care been reviewed/evaluated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. If homeowner, has home equity as a use of funds been discussed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Are long-term care insurance benefits available?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Have various housing options and their costs been considered? • In-home care • Living with a relative • Continuing care retirement community • Assisted living • Nursing home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
Insurance planning	Yes	No	N/A



1. Is adequate health insurance available? • Medicare • Medigap • Private health insurance • Prescription plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Have Medicaid planning goals and strategies been considered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Has Medicaid qualification criteria been discussed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Has the need for long-term care insurance been established?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Is long-term care insurance coverage available to the client?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Have existing long-term care insurance policies been reviewed/evaluated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does long-term care insurance coverage need to be upgraded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Do long-term care benefits need to be accessed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
Estate planning	Yes	No	N/A
1. Has long-term care planning been coordinated with estate planning needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Have appropriate estate planning documents been prepared? • Will • Trust	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Have advanced medical directives been prepared? • Durable power of attorney • Living will • Health-care proxy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Have letters of instruction been prepared?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Has this information been communicated to family members?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
Other	Yes	No	N/A



<p>1. Has the need for organizing important documents and records been discussed?</p> <ul style="list-style-type: none">• Bank account records (statements and passbooks)• Monthly bills to be paid• Stock certificates, bonds, and other investment records• Retirement plan statements• Real estate deeds, mortgages, and other property ownership records• Vehicle titles• Business agreements• Insurance policies• Will, trust, advanced medical directives, letters of instruction, and other documents• Birth certificate, marriage certificate, divorce decree, military service papers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>Notes:</p>			

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