Confidential Questionnaire

Personal and Contact Information

Full Name	Date of Birth	Full Name (Spouse)	Date of Birth
Cell Phone / Email		Cell Phone / Email	
Primary Residence Street & No.	City	State	Zip
Secondary Residence Street & No.	City	State	Zip
Mailing Address	City	State	Zip

Employment & Insurance Plans

Employer - Retired or Currently Employed?	Insurance Carrier	Spouse Employer - Retired or Currently Employed?	Insurance Carrier
Premium / Type of Insurance (HMO, PPO, etc.)		Premium / Type of Insurance (HMO, PPO, etc.)	
Est. Retirement Date	Last Day of Coverage	Est. Retirement Date	Last Day of Coverage
Options Post-Retirement			

Military

Military Service?	Branch	Military Service?	Branch
Benefits from military service currently being received. (VA, ChampVA, Tricare). Who is entitled to those benefits?			
How are those benefits being used? Last visits?			

Medicare & Insurance Plans

Part A Effective Date	Part B Effective Date		Part A Effective Date	Part B Effective Date	
Will your gross monthly income exceed $1500 if single and $2000 if married?					
Medicare Supplement Carrier	Plan	Premium	Medicare Supplement Carrier	Plan	Premium
Part D Plan		Premium	Part D Plan		Premium
Medicare Advantage Plan		Premium	Medicare Advantage Plan		Premium
What do you Like about the plan(s) you have?					
What do you Dislike about the plan(s) you have?					

Physicians & Prescriptions

Primary Care Physician	Keep?	Primary Care Physician	Keep?
Other Specialists/Physicians		Other Specialists/Physicians	

Prescription	Dose	Frequency	Prescription	Dose	Frequency
What is it for?			What is it for?		
Prescription	Dose	Frequency	Prescription	Dose	Frequency
What is it for?			What is it for?		
Prescription	Dose	Frequency	Prescription	Dose	Frequency
What is it for?			What is it for?		
Rx Reference #	Date	Zip	Rx Reference #	Date	Zip

Gaps in Coverage - Medicare Supplement

Short Term Care Ins. Carrier	Premium	Short Term Care Ins. Carrier	Premium
Benefit		Benefit	
Have you or a loved one ever needed to stay at any type of skilled nursing facility? What was the cost / Do you know what the cost would be?			
If needed, could your kids or a relative provide 24/hour care for you at a moments notice?			
If you needed to stay at a skilled nursing facility, how would you pay for it?			

Cancer Insurance Carrier	Premium	Cancer Insurance Carrier	Premium
Benefits		Benefits	
History of Cancer in your family?	Time in Remission?	History of Cancer in your family?	Time in Remission?
What did insurance cover/NOT cover?		What did insurance cover/NOT cover?	
What would be costs associated with current insurance?		What would be costs associated with current insurance?	
If there were a cancer diagnosis, how would 10-20k help?			

Gaps in Coverage - Medicare Advantage

Hospital Indemnity Plan Carrier	Premium	Hospital Indemnity Plan Carrier	Premium
Benefits		Benefits	
Last time in the Hospital		Last time in the Hospital	
What is your hospital copay?		What is your hospital copay?	
How would you pay for a week in the hospital?			

Cancer Insurance Carrier	Premium	Cancer Insurance Carrier	Premium
Benefits		Benefits	
History of Cancer in your family?	Time in Remission?	History of Cancer in your family?	Time in Remission?
What did insurance cover/NOT cover?		What did insurance cover/NOT cover?	
What would be costs associated with current insurance?		What would be costs associated with current insurance?	
If there were a cancer diagnosis, how would 10-20k help?			

Life Insurance

Life Insurance Carrier		Premium	Life Insurance Carrier		Premium
Type of Policy	Face Amount	Dates of Coverage	Type of Policy	Face Amount	Dates of Coverage
What is this policy designed to do?			What is this policy designed to do?		
What do you have in place specifically to pay for your final arrangements?			What do you have in place specifically to pay for your final arrangements?		

Dental/Vision/Hearing

Dental insurance?	Premium	Dental Insurance?	Premium
Vision insurance?	Premium	Vision insurance?	Premium
Hearing insurance?	Premium	Hearing insurance?	Premium
What are your benefits? What benefits are you in need of?		What are your benefits? What benefits are you in need of?	

Are there any other questions I should be asking that I haven't asked yet?