

**LONG TERM CARE FACTFINDER**

**AGENT** \_\_\_\_\_

Client Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Smoker \_\_\_\_\_

**NEED QUALIFICATION:**

"How long could you afford to pay for a Nursing Home which costs \$90,000/ yr"

OR

1) Total Assets: \_\_\_\_\_

2) Income: Qualified \_\_\_\_\_  
Other \_\_\_\_\_

3) Expected Retirement Income: \_\_\_\_\_

4) Do you intend on staying in New York State? \_\_\_\_\_

**How do you feel about the following statements:**

As I age, I fear becoming dependent on close friends and family members for my personal needs. *Agree Strongly* *Agree* *Disagree* *Disagree Strongly*

If I ever need long term care, I want the financial freedom to chose where and how I "ll receive care. *Agree Strongly* *Agree* *Disagree* *Disagree Strongly*

**HEALTH QUALIFICATION:**

1) Have you been treated for any medical conditions in the past 5 years? Please list, including dates. **Height and Weight**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2) Are you currently taking any medication? Please list medication, dosage, date prescribed, reason for drug:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3) Have you been hospitalized in the past 5 years? Please list dates and reasons.

\_\_\_\_\_  
\_\_\_\_\_

**PLAN DESIGN**

Nursing Home Daily Benefit \_\_\_\_\_

Home Care Benefit \_\_\_50% \_\_\_75%/80% \_\_\_100%

NY State Partnership - dollar for dollar \_\_\_ or total asset \_\_\_; Non-Partnership \_\_\_; Both \_\_\_

Benefit Period \_\_\_ 3 yr \_\_\_5/6 year \_\_\_Unlimited \_\_\_ Other

Shared Benefits \_\_\_\_\_

Elimination Period \_\_\_0/20 \_\_\_50/60 \_\_\_90/100 \_\_\_Other

Inflation \_\_\_None \_\_\_Simple \_\_\_Compound \_\_\_Compound 2x, \_\_\_Other

Married \_\_\_Yes \_\_\_No

Other Riders: \_\_\_\_\_

Requested Company \_\_\_\_\_ or best company \_\_\_\_\_  
Allianz, AIN, GE Capital, John Hancock, Mass Mutual, MetLife, MedAmerica, Mutual Of Omaha, Prudential, UNUM

**Fax to Specific Solutions Inc. 716-632-6051, email [agency@specificsolution.com](mailto:agency@specificsolution.com) or Call**

**716-632-7777 or 1-800-873-2345 for assistance.**