

Planning ahead helps to ensure that you and your loved ones are supported now and in the future. This tool helps you define your funding strategies and care preferences to easily share them with others.

This planning tool provided by:

Financial Professional

Email

Phone Number

How will you pay for care when you need it?

Name

Email

Address 1

Address 2

City

State

Zip

Phone Number

Marital Status

Age

Care costs

Estimated costs of long-term care in your area:

	Current costs	Future costs []
At-home care		
Assisted living community		
Private nursing home		

The information shown above is generated by the Cost of Care Survey tool. Future costs assume care starts at about age 85 and, depending on your current age, are projected in 10, 20, 30, 40, or 50 years, assuming an annual 3% inflation rate. For more information and location comparison, visit carescout.com/cost-of-care. Estimated care costs are based on medians. Actual care costs and claim ages will vary.

Care funding

What sources of savings or income will you use to fund long-term care expenses? Include funds from savings/investments, retirement accounts, health savings accounts, and insurance benefits.

Account type	Account name	Account number	Account value

It's important to understand the potential tax implications of using different asset accounts to pay for care. Consult with a tax advisor for information specific to your situation.

Care considerations

- If you need extended care, who will manage and provide your care?
- If someone else will manage your care, where do they reside?
- Do you have experience navigating care options?
- Where will you find care support and high-quality care providers?

Share this tool with those you expect to oversee your care so you can start the planning conversation now. It's important to periodically review and update this information as your life situation changes to ensure that it is current and accurate.

Next steps

- Finalize care funding plan with financial professional
- Share plan with loved ones
- Review plan together with financial professional

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This information should be stored in a secure location and is solely meant as a tool to help you and your loved ones identify important information to help manage your future long-term care needs.

This is not a legal document and does not replace an advanced directive/living will, or a power of attorney (durable or springing) for your health care or finances.

This does not constitute legal, tax or financial advice, for those you should consult with an attorney, tax professional or financial professional respectively.

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