



Client Profile

Please complete and email this Healthcare Cost fact finder to RSG@PacificLife.com. We will generate and email you an illustration summarizing Healthcare costs and possible solutions. Please call us at (800) 722-2333, ext. 3939 should you have any questions.

IMPORTANT: Each section MUST be completed for an illustration to be generated.

Retirement Healthcare Fact Finder

Financial Professional:	_____
Broker/ Dealer:	_____
Email:	_____
Phone:	_____
License #:	_____

General Information

First Name _____

Last Name _____

Date of Birth _____

Sex Male Female

Retirement Age¹ _____

Retirement State _____

Financial Information

Current Income _____

Income Replacement Ratio %² (e.g. 75%) _____

Health Conditions

Have you been diagnosed with (Select all that apply):

- High blood pressure High Cholesterol High Type 2 Diabetes Cardiovascular Disease
- Cancer Tobacco Use

Current Marital Status

What is your current marital status? Single Married

Health Care Coverage

Premiums

- Include All
- Hospitals, Doctors and Tests (Medicare Part A & B)
- Prescription Drugs (Medicare Part D)
- Supplemental Insurance (Medigap)
- Dental Insurance

Additional out-of-pocket expenses

- Include All
- Hospitals, Doctors and Tests
- Prescription Drugs
- Hearing & Vision Costs
- Dental Costs

¹ Age when client retires from main job, not necessarily Social Security claim age.

² To estimate income related Medicare surcharges ("IRMAA") client's current household income will be inflated by 3% until retirement and reduced by this %.

Insurance products can be issued in all states, except New York, by Pacific Life Insurance Company or Pacific Life & Annuity Company. In New York, insurance products are only issued by Pacific Life & Annuity Company. Product/material availability and features may vary by state.

*Current Spouse***General Information**

First Name _____

Last Name _____

Date of Birth _____

Sex Male FemaleRetirement Age¹ _____

Retirement State _____

Financial Information

Current Income _____

Health Conditions

Has your spouse been diagnosed with (Select all that apply):

- High blood pressure High Cholesterol High Type 2 Diabetes Cardiovascular Disease
- Cancer Tobacco Use

¹ Age when client retires from main job, not necessarily Social Security claim age.

INVESTMENT AND INSURANCE PRODUCTS ARE:

- NOT FDIC INSURED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY
- NOT A DEPOSIT OR OTHER OBLIGATION OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS AFFILIATES
- SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED

Pacific Life refers to Pacific Life Insurance Company and its affiliates, including Pacific Life & Annuity Company. Insurance products can be issued in all states, except New York, by Pacific Life Insurance Company or Pacific Life & Annuity Company. In New York, insurance products are only issued by Pacific Life & Annuity Company. Product/material availability and features may vary by state. Each insurance company is solely responsible for the financial obligations accruing under the products it issues.

The results and explanations generated by this calculator may vary due to user input and assumptions. Pacific Life does not guarantee the accuracy of the calculations, results, explanations, nor applicability to your specific situation. We recommend that you use this calculator as a guideline only and ultimately seek the guidance of an experienced professional. HealthView Services, Inc., the provider of this information and interactive calculator, is an independent third-party and is not affiliated with Pacific Life.