
Financial and Personal Resources Review

Prepared for: _____

Prepared by: _____

Date: _____

1. Health Coverage

Do you believe your current health coverage adequately covers:

A. Hospitalization costs?	Yes	No
B. Nursing home costs?	Yes	No
C. Home health care costs?	Yes	No
D. Assisted living costs?	Yes	No

2. Health Care Preferences

If you suffered a long-term disability as a result of a stroke, where would you prefer to receive care?

A. Nursing home?	Yes	No
B. Own home?	Yes	No

3. Financial Resources for Health Care

If you were faced with a nursing home bill of \$71,000* right now, how would you pay for it?

A. From savings?	Yes	No
B. Bank loan?	Yes	No
C. Other sources?	Yes	No
Describe:		

* The 2006 Genworth Financial Cost of Care Survey found that the private-room cost for a year in a nursing home ranges from \$42,304 in Louisiana to over \$140,000 in New York City, with a national average of \$70,912.

How long could you personally afford to pay a \$71,000 nursing home bill from those resources?

A. 1 year?	Yes	No
B. 2.5 years (<i>the average nursing home stay</i>)?	Yes	No
C. 5 years or longer?	Yes	No

Would your children be in a financial position to help pay for this care?	Yes	No
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3. Financial Resources for Health Care (continued)

How would you prefer to pay for this care if you had a choice?

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|------------------------|-----|----|
| A. Private resources? | Yes | No |
| B. Insurance benefits? | Yes | No |

If your answer is insurance, is there any reason why you haven't purchased it?

4. Personal Resources for Health Care

If you became ill tomorrow, would your family:

- | | | |
|---|-----|----|
| A. Be trained to provide you with at-home medical care? | Yes | No |
| B. Have the time to provide you with at-home care? | | |
| For a week? | Yes | No |
| For a month? | Yes | No |
| Nine months? | Yes | No |
| A year or more? | Yes | No |
| C. Be physically able to provide at-home care on a long-term basis? | Yes | No |
| D. Be able to quit work to provide care? | Yes | No |

5. Goals for Financial Resources

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|---|-----|----|
| A. Would you like to leave an estate to your children? | Yes | No |
| B. Would you like to help pay for your grandchildren's education? | Yes | No |
| C. Would you want to die impoverished, leaving your children in debt for your care? | Yes | No |