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## 🛡️ LONG-TERM CARE READINESS SCORECARD

### Clarity Before Crisis.

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#### Purpose

Long-term care is not simply a healthcare issue — it is often one of the largest financial and family governance events a household will face.

This scorecard helps determine:

- Likelihood of insurability
- Financial readiness
- Strategic exposure
- Whether proactive planning is warranted

*Confidential Planning Tool – Not an Insurance Application*

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### SECTION 1 — Personal Snapshot

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ State: \_\_\_\_\_

Height: \_\_\_\_\_ Weight: \_\_\_\_\_

Tobacco Use (past 12 months):  Yes  No

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### SECTION 2 — Health Risk Review

(Check any that apply)

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- Alzheimer's / Dementia / Cognitive Impairment
- Parkinson's Disease
- Stroke / TIA
- Cancer (within past 5 years)
- Heart Attack / Coronary Artery Disease
- Insulin-Dependent Diabetes
- COPD / Chronic Lung Disease
- Multiple Sclerosis
- Kidney Disease
- Rheumatoid Arthritis
- Anxiety / Depression (treated past 24 months)
- None of the Above

Hospitalizations in past 24 months:  Yes  No

Number of prescription medications: \_\_\_\_\_

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### SECTION 3 — Functional Independence

Do you require assistance with:

- Bathing
- Dressing
- Toileting
- Transferring
- Eating
- Continence

Falls in past 12 months:  Yes  No

Mobility Aid Used:

- None  Cane  Walker  Wheelchair

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Memory concerns:  Yes  No

Currently driving:  Yes  No

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#### **SECTION 4 — Financial Positioning**

Household Income:

- Under \$100k
- \$100k–\$250k
- \$250k–\$500k
- \$500k+

Investable Assets (excluding primary residence):

- Under \$250k
- \$250k–\$1M
- \$1M–\$3M
- \$3M+

Primary Objective:

- Asset Protection
- Liquidity Creation
- Reduce Family Burden
- Estate Efficiency
- Tax Strategy

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**Readiness Assessment (Advisor Use)**

Health Risk Factors Identified: \_\_\_\_\_

Readiness Tier:

- Tier 1 – Strong Candidate (Likely Preferred/Standard)
- Tier 2 – Structured Design Required
- Tier 3 – Hybrid or Asset-Based Strategy
- Tier 4 – Asset-Funded Care Planning

Advisor Notes:

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**Strategic Financial Planning for the Care Years**

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