



Personal Retirement Health Assessment Profile

Key Financial Issues	Myself \$	Dependent(s) \$
Existing Known Cost Impactors		
1 Current Annual Health Claims		
What are your actual annualized claims results over the past 12 months ?		
> \$ claimed for ongoing prescription drugs	\$ -	\$ -
> \$ claimed for ongoing typical dental care	\$ -	\$ -
> \$ claimed for vision and/or hearing aids	\$ -	\$ -
> \$ claimed for professional paramedical services	\$ -	\$ -
> \$ claimed for medical services / supplies	\$ -	\$ -
> \$ claimed for other benefit services	\$ -	\$ -
	\$ -	\$ -
2 New or emerging Health Issues		
What is the projected annual claim costs associated with managing any new or emerging health issues ?		
	\$ -	\$ -
3 Anticipated Travel plans & Insurance costs		
how often do you intend to travel annually ? and for how long each trip ?		
(if travel is planned - what would be your annual travel insurance costs)		
	\$ -	\$ -
Annual Expected Combined Ongoing Costs		
	\$	-
Other Important Health Care Considerations		Comments / Considerations
4 Family Health History		
Are there (or were there) any family health issues that could likely or potentially impact your (or your spouses) health status in the future ?		
5 Lifestyle Impacts		
Relative to healthy diet, exercise, physical fitness and other general health indicators would you (and dependents) be viewed as having a healthy lifetsyle ?		
6 Provincial Health Coverage for Seniors		
Are you aware of the health insurance benefits/services provided to seniors, if any , through your provincial health care plan? Is their a benefits void impacting you?		
7 The Unknown		
The Unknown - unexpected health events or circumstances that could impact your retirement financial plans in the future.		
Other General comments		

