

# Navigating the Healthcare Marketplace

## All About You

Prentice Wealth Management, LLC  
110 Linden Oaks Dr., Ste. F  
Rochester, NY 14625  
Phone: 585.218.0001



### Tell us about you

Client name: \_\_\_\_\_

Coverage Start Date: \_\_\_\_\_

Persons Covered:  Individual  Couple  Parent & Child Only  Family

Number of adults needing coverage: \_\_\_\_\_ Children under age 19: \_\_\_\_\_

Total Household income per year: \_\_\_\_\_



### Existing Coverage

Carrier: \_\_\_\_\_

Health Category:  Bronze  Silver  Gold  Platinum

Monthly Premium: \_\_\_\_\_ Annual Premium: \_\_\_\_\_

Deductible: \_\_\_\_\_ Year to Date: \_\_\_\_\_

Out of Pocket Max: \_\_\_\_\_ Year to Date: \_\_\_\_\_

Copay/Specialist: \_\_\_\_\_ Year to Date: \_\_\_\_\_

RX's: \_\_\_\_\_ Year to Date: \_\_\_\_\_



### Existing and Future Medical Needs

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