

HealthPlanning Analysis

There are many transitions in life, from building a family to getting ready to retire, and everything in between. These life events often result in a change to your health coverage. Whether it's Medicare, COBRA, retiree health plans, or other options, we are here to offer financial insights and guidance with our trusted partners at Caribou, who are a non-commissioned resource where you can gather and evaluate options that fit your specific needs and preferences.

Are you in one of the following situations?

Eligible for Medicare

You can enroll during a seven-month window surrounding your birth month or at the time of retirement if past 65.



Retiring (before 65)

You have many options, like COBRA, the marketplace, or retiree benefits to explore.



Other life transitions & qualifying events

Such as switching jobs, divorce, death of a spouse, children turning 26, having a baby, or relocation.



We can help!

Accessing this service involves four easy steps:

- Step 1.** Reach out to your advisor to let them know you're interested in an analysis. They will set up your account.
- Step 2.** Within your account, you will complete a questionnaire, detailing your medical providers, medications, and more.
- Step 3.** Within three days, you will receive an analysis of expected costs and plan options that are tailored to your needs and preferences.
- Step 4.** Arrange an optional debrief call to get any questions answered about your analysis and discuss next steps.

