

Building stronger financial futures through healthcare planning.

Caribou is a healthcare planning company that works exclusively with financial advisors to plan for clients' current and future healthcare costs, creating a holistic financial plan that ensures peace of mind. Caribou's software, HealthPlanner, creates a custom HealthPlanning Analysis, tailored around major life events, that saves clients **\$6,632*** on average per year.



How Financial Advisors Are Using HealthPlanner

- To match health, budget, and preferences to new health plan options for the Marketplace and Medicare due to employment transitions, Open Enrollment, and other qualifying Life Events.
- To find tax savings opportunities (premium tax credits, medical tax deductions, HSA tax savings, etc.).
- To provide a summary of current coverage and expenses, as well as snapshots for future events (e.g., "What does Medicare look like for this client in TX on this drug?")

The Value of Healthcare Planning



Improves client retention & attracts new prospects.



Provides actionable guidance for health insurance.



Protects retirement plans & mitigates risks.

*Data taken from all 2022 HealthPlanner users

Ready to see HealthPlanner in action?

Request a demo by clicking here or visiting www.caribouwealth.com/book-a-call

Meet HealthPlanner

Our custom, white-labeled HealthPlanning Analysis includes:

- Tailored, side-by-side health plan option comparisons for Medicare & the Marketplace.
- Healthcare spending snapshot.
- Current health coverage and life events summary.
- In-platform, secure messaging with Caribou's HealthPlanning Coordinators.

Household Information				
Household Information				
Executive Summary (*)	Medicare Enrollment Analysis	Robert Pre-65 (P	farketplace)	Jenny Robert Jr
Medicare	Encounterrainarysis			
Marketplace (Pre-65)	Tailored Plan Options based on	vour preferences		
Healthcare Financials	The type of coverage presented below is b	ased on your Life Events, age, and the inform	ation on your profile, su	ch as your preference
	rankings.			
		Other options Based on		preferences
	Reference	Plan setup for	Plan setup for	
	Your Current Coverage	2023 Medicare Original	2023 Medica	re Advantage
	Summary	Summary Su		mary
	Est. Monthly Fixed Costs	Est. Monthly Fixed Costs	Est. Monthly Fixed Costs	
	\$0	\$ 732.20	\$ 539.20	
	Est. Annual Drug Costs	Est. Annual Drug Costs	Est. Annual Drug	Dosts
	\$ 600	\$ 13,286.43	\$ 529	
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Implementation & Ongoing Success Management

In addition to our healthcare planning software, HealthPlanner, you'll also have access to marketing and learning resources.

Learn Center

You'll have access to dozens of short, easyto-understand articles explaining various healthcare topics for you and your clients.

Free CE Courses

Get access to onecredit continuing education courses about a variety of healthcare topics to further your healthcare knowledge.

Marketing Resources

We supply you with branded marketing resources for you to use (e.g. webinars, blogs, brochures, and website copy) to showcase your new offering.



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