



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?")

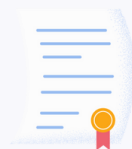
The Value of Healthcare Planning



Improves client retention & attracts new prospects.



Provides actionable guidance for health insurance.



Protects retirement plans & mitigates risks.

*Data taken from all 2022 HealthPlanner users

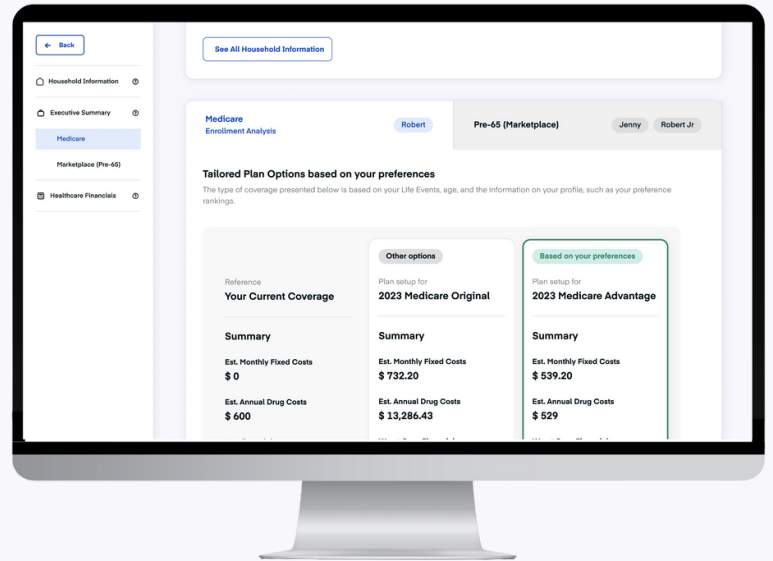
Ready to see HealthPlanner in action?

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.



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, easy-to-understand articles explaining various healthcare topics for you and your clients.



Free CE Courses

Get access to one-credit 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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