

A man and a woman are sitting on a boat, looking at each other and smiling. The man is wearing sunglasses and a white shirt, and the woman is wearing a grey tank top. The background is the blue water of the sea.

Long term care insurance

Financial priorities questionnaire

Allianz Life Insurance Company
of North America

Allianz 

To help you reach your financial goals and protect your nest egg, I'd like to understand your feelings about the plans that you have in place for yourself and your family.

Your answers to this brief, confidential survey will give me a better idea of your current situation. They will also help us determine how best to proceed from here.

Please tell me more about your concerns by indicating how you relate to the following statements. Indicate your response by checking the appropriate box to the right of each statement.



	Strongly agree	Somewhat agree	Disagree	Not sure
1. I am concerned about preserving my financial independence.				
2. I would like to avoid becoming physically or financially dependent on family members for my care.				
3. I want to help protect myself against the possibility of becoming a burden to my loved ones.				
4. It is important that I have a choice of where I receive my long term care.				
5. I would like to maintain the wealth I have created during my lifetime.				
6. I don't want the costs of my care to become debt shouldered by my heirs.				
7. I have assets that are not currently being used to maintain my lifestyle.				
8. I have assets that would be difficult to liquidate in the event of a financial emergency that lasted more than three months.				
9. As a business owner, I am interested in ways insurance premiums can impact tax deductions.				
10. I have a parent or grandparent whose ability to take care of him/herself was affected by a change in his/her health.				

Allianz does not give legal, tax, or Medicaid advice. Allianz representatives may not give such advice acting for Allianz. All potential policyowners and annuitants with questions should be advised to consult a qualified elder law attorney or the Medicaid office in their state.

Thank you for taking the time to share your comments.

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Product availability and features may vary by state.

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