

Consultation Checklist

Please bring the following information to your scheduled consultation:

- Names, Dates of Birth, and Social Security Numbers of all members of the household, even if they are waiving coverage
- The attached Marketplace Tax Credit Questionnaire
- The attached 2022 Income Estimate Worksheet
- Income Information-A copy of the 2020 Federal Tax Return is helpful. Many times, the Marketplace will require proof of income and a current tax return will usually be sufficient. Occasionally they will also request a few weeks' worth of paycheck stubs if they are available.
- Payment-Plans will not begin until payment is made. Most carriers require EFT payment. Please bring a copy of a voided check for the account from which you will want payments made.
- Marketplace Account Log-In Information- If you have previously enrolled in the Marketplace, or you have created an account to research options, please be sure to bring your username and password. PLEASE test the log-in prior to the meeting. Visit www.healthcare.gov to make sure your log-in is active. If not, please follow their instructions to reset your password or call the Marketplace and have them assist with the reset. We MUST be able to log into your account at the meeting.

If you have never enrolled on the Marketplace it would be very helpful if you are able to create an account prior to the consultation. If you can simply visit www.healthcare.gov and enter your basic information to create a username and password and then check your email to click the link to confirm you have started the process, we will help with the rest when you come in. Be sure to bring the log-in info with you. If you have problems creating this on-line account, we are happy to help set this up the first time during your consult.

Marketplace Tax Credit Questionnaire

Individuals that meet certain criteria may be eligible to receive assistance with advanced tax credits to help pay the cost of premiums. If you would like to see if you qualify for these credits, please answer the questions below.

1. Do you have medical insurance available to you through your employer or your spouse's employer?
(If the answer is yes, most of the time assistance is unavailable but there are certain circumstances that may allow. You can speak with your broker at your consultation for additional information.)

YES or NO

2. Are you are married?

YES or NO

3. Will you be filing a joint tax return with your spouse in 2022?

YES or NO

4. How many children/tax dependents will you claim on your 2022 taxes?

_____

2022 Income Estimate Worksheet

To be completed for entire household for anyone **required** to file a tax return, even if they are waiving coverage. Note- most “children” are not required to file unless they make over approximately \$12,400 of earned income. Speak with your accountant or tax preparer to confirm.

Federal Taxable Wages (from your job) _____

Tips _____

Self-Employment Income _____
(Include net self-employment income you expect, what you will make minus business expenses)

Unemployment Compensation (from your state) _____

Social Security _____
(Include both taxable and non-taxable and enter the full amount before any deductions.)

Social Security Disability Income (SSDI) _____
(Do NOT include Supplemental Security Income (SSI))

Retirement or Pension Income _____
(Include most IRA and 401K withdrawals. Do not include qualified distributions from a Roth)

Alimony _____
(If divorce/separation was finalized before 2019)

Capital Gains _____

Investment Income _____
(Include expected interest and dividends earned on investments, including tax exempt interest)

Rental and Royalty Income _____
(Use net rental and royalty income)

Excluded (untaxed) Foreign Income _____

TOTAL _____

The following do not need to be included: Economic Impact/Stimulus Payments, Child Support, SSI, Qualified Distributions from a designated Roth, Gifts, Veterans Disability Payments, Workers Compensation, Proceeds from Loans, Child Tax Credit Checks