

Health Insurance Planning Workbook

This workbook is designed to help you organize your healthcare needs, compare plans, and prepare questions for a licensed broker.

Section A: Personal & Family Information - Full Name: _____ - Age: _____
- Family Members / Dependents: _____ - Current Coverage: _____

Section B: Health & Medical Needs - Doctors / Providers you want in-network: _____
- Prescription Medications (list with doses): _____
- Preferred Hospitals or Clinics: _____

Section C: Financial Snapshot - Monthly Premium Budget: \$_____ - Emergency Savings Status: _____ - Outstanding Debts: _____

Section D: Insurance Goals & Priorities What matters most to you? (Check all that apply) - ☐ Lowest monthly cost - ☐ Keep my doctors - ☐ Prescription savings - ☐ Wide network access - ☐ Family protection - ☐ Retirement care planning

Section E: Action Plan - What I need to review: _____ - Questions for my broker: _____ - Steps before enrollment: _____

Next Steps Bring this workbook to your consultation with Julio's Policy Path or email it ahead of time for a personalized review.

Visit: www.juliospolicypath.com/contact