

These questions will help provide the best solutions for your medical and supplemental coverage:

Do you qualify for Connect For Health Colorado? Yes/No If so what is your reportable income for you (and spouse).
Do you have the emergency savings to cover large medical bills or is a lower deductible, lower out of pocket plan more important?
Do you or any family members participate in adventure sports (skiing, repelling, dirt biking, mountain biking, sky diving etc) or sports leagues? What kind/how often?
Has anyone in your family had cancer or heart disease (back to parents generation or having several family members have cancer/heart disease? What kind and which family member (parent/sibling)?
What kind of work/job title for you and your spouse?
Is your spouse covered at work for any type of insurance coverage?

Do you currently have the following coverage and if so, with which company and which family member:

Accident Plan	Ex. (ABC Co \$12500 actual charges or XYZ Co expense plan that pays for fractures/ burns)	Short Term Disability Insurance (Waiting Period/Benefit Period and monthly benefits)	Ex. (ABC Co 7 day WP 12 Month, 3000 month)	Long Term Disability Insurance (Waiting Period/Benefit Period and monthly benefits)	Ex. (XYZ col 90 days to Age 67, \$3000/mo)
Cancer Plan		Critical Illness Plan		Long Term Care Plan	
Life Insurance	Ex. (30 year term \$1 M policy on John, \$500k on Marge) both with Farmers and \$100,000 UL	Retirement Plan	Ex. 401k rollover to IRA with Schwab		

Small Business Owners:

Do you currently have a full time or side business?
Does your business deal with contracts, data or do you develop software or advise clients as a consultant (non sales)? Do you have professional liability coverage (E&O)?
Do you have full time or contract employees? Do you have workers compensation coverage?
Do you work with at CPA or Attorney for complex or business issues?


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- ◆ Employee Benefits
- ◆ Income Protection
- ◆ Accident Coverage
- ◆ Critical Illness Coverage
- ◆ Individual/Group Health Insurance
- ◆ Supplemental Coverage
- ◆ Dental/Vision Insurance
- ◆ Hospital Indemnity Plan
- ◆ Commercial Business Coverage
- ◆ Life Insurance
- ◆ Key Man/Buy Sell
- ◆ Legal Plan/Identity Theft



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