



# MEDICARE

## COST WORKSHEET

Use this planner to estimate your monthly  
Medicare-related insurance premiums

# MEDICARE COSTS WORKSHEET

Enter the appropriate amounts below to estimate your Medicare insurance costs.

ORIGINAL MEDICARE	SUBTOTALS
Part A Monthly Premium (No premium for most people)	
Part B Monthly Premium	
Additional <a href="#">Part B</a> Premium Due to Higher Annual Household Income	

MEDIGAP PLANS	COMPANY A	COMPANY B	COMPANY C	
Insurance Company				Enter the premium for the company you choose below.
Name of Plan (F, G, etc.)				
Monthly Premium				

## ADD EXTRA CANCER COVERAGE

LUMP SUM BENEFITS	\$10,000	\$20,000	\$30,000	
Monthly Premium				

If you're interested in comparing Medicare Advantage plans, be aware that they aren't standardized, so check to see if you can use any doctor, other health care provider, or hospital, whether prescription drugs covered, if you need to choose a primary care doctor, and if you have to get a referral to see a specialist.

PART D DRUG PLANS	COMPANY A	COMPANY B	COMPANY C	
Insurance Company				Enter the premium for the company you choose below.
Monthly Premium				
Additional <a href="#">Part D</a> Premium Due to Higher Annual Household Income				

*Continued on the next page...*

# MEDICARE COSTS WORKSHEET CONTINUED

FINAL EXPENSE INSURANCE	COMPANY A	COMPANY B	COMPANY C	
Insurance Company				Enter the premium for the company you choose below.
Benefit Amount				
Monthly Premium				

<b>TOTAL ESTIMATED PREMIUMS</b>	
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## WANT US TO FIGURE THESE COSTS FOR YOU?

Contact one of our experienced agents. We'll do all the work, and it's absolutely free!

122 W. Prairie Avenue | Decatur, IL 62523 | 800-284-7267 | [www.samshockaday.com](http://www.samshockaday.com)

## PART B COSTS

IF YOUR YEARLY INCOME IN 2019 (FOR WHAT YOU PAY IN 2021) WAS			YOU PAY EACH MONTH (IN 2021)
FILE INDIVIDUAL TAX RETURN	FILE JOINT TAX RETURN	FILE MARRIED & SEPARATE TAX RETURN	
\$88,000 or less	\$176,000 or less	\$88,000 or less	\$148.50
above \$88,000 up to \$111,000	above \$176,000 up to \$222,000	Not applicable	\$207.90
above \$111,000 up to \$138,000	above \$222,000 up to \$276,000	Not applicable	\$297.00
above \$138,000 up to \$165,000	above \$276,000 up to \$330,000	Not applicable	\$386.10
above \$165,000 and less than \$500,000	above \$330,000 and less than \$750,000	above \$88,000 and less than \$412,000	\$475.20
\$500,000 or above	\$750,000 and above	\$412,000 and above	\$504.90

## PART D COSTS

IF YOUR YEARLY INCOME IN 2019 (FOR WHAT YOU PAY IN 2021) WAS			YOU PAY EACH MONTH (IN 2021)
FILE INDIVIDUAL TAX RETURN	FILE JOINT TAX RETURN	FILE MARRIED & SEPARATE TAX RETURN	
\$88,000 or less	\$176,000 or less	\$88,000 or less	your plan premium
above \$88,000 up to \$111,000	above \$176,000 up to \$222,000	not applicable	\$12.30 + your plan premium
above \$111,000 up to \$138,000	above \$222,000 up to \$276,000	not applicable	\$31.80 + your plan premium
above \$138,000 up to \$165,000	above \$276,000 up to \$330,000	not applicable	\$51.20 + your plan premium
above \$165,000 and less than \$500,000	above \$330,000 and less than \$750,000	above \$88,000 and less than \$412,000	\$70.70 + your plan premium
\$500,000 or above	\$750,000 and above	\$412,000 and above	\$77.10 + your plan premium

# HERE'S WHAT OUR CLIENTS SAY...

“ We really enjoyed getting to know Chase & he helped us soo much with insurance! I would highly recommend him to anyone looking to save money on Medicare Supplement! He is so helpful and understanding!”

-B.H. Petersburg, IL

“ NO MUSS, NO FUSS! That's exactly the way I was treated, professionally/accurately! Laura answered all my questions regarding medical coverage that I was looking for and suggested and provided me with medical plans that satisfied my needs, taking care of all the paperwork required, leaving me with a smile on my face and saving money! Thanks so very much for your professional, expert, courteous advice and service!

-D.G., Decatur, IL

“ I appreciate the fact that I feel as if the company is looking out for me. I don't have to spend my time chasing down unpaid claims like other companies have left me to do. I'm old fashioned in that I like to feel that as a customer I'm appreciated and Sams/Hockaday does exactly that!

-D. B., Customer

“ Patty has taken care of being sure I have had the best coverage for the money for over 15 years. She always alerts me to any better coverage on her own. She takes the time to explain all the options to you and gives a clear picture. She is a dedicated and resourceful agent.

-Linda H., customer since 1996

“ When we received the letter telling us after over 40 years that we would no longer have insurance we were at a complete loss. Luke helped us every step of the way to find the right plan for us. We can not thank him enough.

-J. H., Customer

“ I have always been greeted at the front desk with a smile, and It is the personal touch that Janet offers to her clients. It's like coming to visit a friend... and oh, also, discussing my insurance needs. Janet is so friendly, I never feel rushed out, how could anyone go anywhere else? My insurance needs are well handled. I never have to worry about my rates, coverage or claim forms. When I have concerns I can call Janet and she will fix it. It's great peace of mind. I have recommended Sams/Hockaday many times and will continue to do so. Thank you for a great service.

-Cora C., customer since 2013

“ The act of coming to our home and sitting down at the kitchen table to work through the important points, costs, and coverages made a BIG difference. It beats trying to work through all the if/then scenarios on-line or by telephone. Rachel was patient and understanding which was critically important to us.

-J. L., Customer

“ Simply too good to be able to speak with a knowledgeable person without being put on hold for 30 min to 1 hour. What takes me 2 hours to accomplish by phoning a 3rd party could be handled in less than 5 min by calling your office with the same or in most cases better results.

-D. V., Customer

“ Michael Sams understands our needs and financial abilities. He found plans that helped us. We trust his knowledge and trust his integrity.

-Patricia A., customer since 2011

“ I felt after meeting Jack, that I could trust him to guide me in the right direction for my insurance needs. He has my complete confidence! It is hard to beat experience.

-James S., customer since 2010