

# Free Online Assessment



## IRMAA Risk Assessment

Medicare, through its Income Related Monthly Adjustment Amount (IRMAA), imposes surcharges on higher-income retirees for physician, outpatient services, and prescription drug coverage.

These higher premiums are automatically deducted from any Social Security benefit received. To understand the depth of Medicare's IRMAA impact, income generated in retirement must be understood.



### What information do we need to complete your assessment?

- ✓ Tax Filing Status in Retirement (*Married Filing Jointly, Married Filing Separately, Single*)
- ✓ Name, Gender, Current Age, & Retirement Age
- ✓ Any Retirement Income (*e.g. 401k, annuity, IRA, pension, social security*)
  - Owned by? Balance at retirement? Beginning age of withdrawals? Monthly withdrawal amount?

### Who do I contact when I want to begin?

Contact Corie Coyne at [corie@marcalifeplanning.com](mailto:corie@marcalifeplanning.com).



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ADVISORY SERVICES OFFERED THROUGH MARCA, INC

Disclosure: Information in our assessment is for educational purposes only. Estimates are based on information provided by you. MLP assumes all information you provided is accurate and does not independently verify the accuracy of your information.