



Bultman Financial Services, Inc.
 13625 Bishops Drive, Suite 100
 Brookfield, WI 53005
 (262) 782-9949 Fax: (262) 782-1454

Fax or Mail for an Affordable Care Act Health Insurance Quote and Consultation

Completion of this form does not constitute a health insurance contract but merely a request for information

Your Name: _____ Date of Birth: _____

Spouse Name: _____ Date of Birth: _____

Home Address: _____ City: _____ State: _____

Zip Code: _____ County: _____

Home Phone: _____ Office Phone: _____ Fax: _____

Email Address: _____

Children

Name: _____ Date of Birth: _____

Name: _____ Date of Birth: _____

Name: _____ Date of Birth: _____

Name: _____ Date of Birth: _____

Do you intend to insure your children in the plan? Yes ___ No ___

Tobacco Use Information

Do you currently use tobacco/nicotine products of any kind?

You Yes: _____ No: _____

Spouse Yes: _____ No: _____

Doctor/Healthcare Network Preference

Aurora: ___ Froedtert: ___ Wheaton: ___ Dean: ___ Pro Healthcare: ___

Other: _____ No Preference: ___

Household Income Information

Annual Household Modified Adjusted Gross Income (MAGI) \$ _____

See Attached for information on MAGI

If no household income information is provided, it will be assumed that you do not qualify for any subsidy

Business Information (If Applicable)

Business Name: _____

Business Address: _____ City: _____ State: ___ Zip Code: _____

Number of Employees: _____

Modified Adjusted Gross Income under the Affordable Care Act

July 2013

Under the Affordable Care Act, eligibility for Medicaid and subsidized health insurance through the Exchanges will be calculated using a household's Modified Adjusted Gross Income (MAGI). The Affordable Care Act definition of MAGI under the Internal Revenue Code¹ and federal Medicaid regulations² is shown below. For most individuals who will apply for health coverage under the Affordable Care Act, MAGI will be equal to Adjusted Gross Income.

Modified Adjusted Gross Income (MAGI) =

Adjusted Gross Income (AGI)

Line 4 on a
 Form 1040EZ

Line 21 on a
 Form 1040A

Line 37 on a
 Form 1040

Include:

- Wages, salaries, tips, etc.
- Taxable interest
- Taxable amount of pension, annuity or IRA distributions and Social Security benefits
- Business income, farm income, capital gain, other gains (or loss)
- Unemployment compensation
- Ordinary dividends
- Alimony received
- Rental real estate, royalties, partnerships, S corporations, trusts, etc.
- Taxable refunds, credits, or offsets of state and local income taxes
- Other income

Deduct:

- Certain self-employed expenses³
- Student loan interest deduction
- Tuition and fees
- Educator expenses
- IRA deduction
- Moving expenses
- Penalty on early withdrawal of savings
- Health savings account deduction
- Alimony paid
- Domestic production activities deduction
- Certain business expenses of reservists, performing artists, and fee-basis government officials

Note: Pre-tax contributions, such as those for child care, commuting, employer-sponsored health insurance, flexible spending accounts and retirement plans such as 401(k) and 403(b), are not included in AGI but are not listed above because they are already subtracted out of W-2 wages and salaries.



Add back certain income

- Non-taxable Social Security benefits (Line 20a minus 20b on a Form 1040)
- Tax-exempt interest (Line on 8b on a Form 1040)
- Foreign earned income & housing expenses for Americans living abroad (calculated on a Form 2555)



For Medicaid eligibility Exclude from income

- Scholarships, awards, or fellowship grants used for education purposes and not for living expenses
- Certain American Indian and Alaska Native income derived from distributions, payments, ownership interests, real property usage rights, and student financial assistance
- An amount received as a lump sum is counted as income only in the month received

¹ Internal Revenue Code Section 36B(d)(2)(B)

² Centers for Medicare and Medicaid Services, CMS-2349-F, March 2012

³ Deductible part of self-employment tax; SEP, SIMPLE, and qualified plans; health insurance deduction