Smith&Bormann
HEALTH I INVEST I INSURE

Return completed form to advice@smithbormann.co.za

Principal member:
Date of birth:
Contact number:

# Medical Aid Needs analysis:

1) **Are you aware of any in-hospital medical procedures or day procedures that may occur in 2024?**
   Dependent name:
   Procedure:
   Hospital:
   Surgeon/ Specialist:

   Dependent name:
   Procedure:
   Hospital:
   Surgeon/ Specialist:

   Dependent name:
   Procedure:
   Hospital:
   Surgeon/ Specialist:

2) **Are you aware of any large out-of-hospital expenses that may occur in 2024?**
   Examples: Specialised dentistry, hearing aids, expensive glasses, physiotherapy, prescribed medication and occupational therapy.

   Dependent name:
   Type of expense:
   Estimated annual cost:
   Additional information:

   Dependent name:
   Type of expense:
   Estimated annual cost:
   Additional information:



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**Out-of-hospital expenses continued….**

Dependent name:
Type of expense:
Estimated annual cost:
Additional information:

Dependent name:
Type of expense:
Estimated annual cost:
Additional information:

Dependent name:
Type of expense:
Estimated annual cost:
Additional information:

Dependent name:
Type of expense:
Estimated annual cost:
Additional information:

3) **Chronic medication:**
**(It is imperative that the actual diagnosis of the chronic condition is provided. I am unable to assist if a diagnosis is not provided).**

Dependent name:
Diagnosis:
Medication:
Medication cost: Medication shortfall:

Dependent name:
Diagnosis:
Medication:
Medication cost: Medication shortfall:

Dependent name:
Diagnosis:
Medication:
Medication cost: Medication shortfall:



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**Chronic medication continued……..**

Dependent name:
Diagnosis:
Medication:
Medication cost: Medication shortfall:

Dependent name:
Diagnosis:
Medication:
Medication cost: Medication shortfall:

Dependent name:
Diagnosis:
Medication:
Medication cost: Medication shortfall:

4) **Are there any other medical expenses that you or your dependents are expecting in 2024?** Example: oncology treatments.



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