

PRIOR TO YOUR MEDICARE REVIEW

Complete Your Scope of Appointment SOA

The Scope of Appointment is a checklist identifying the types of Medicare health plans you would like to discuss.

Provide Your Doctor Information: Include your Primary Care Physician and Specialists.

Provide Your Current Medications: Provide a list of current prescription medications, including the name and dosage of each medication.

This allows research into provider networks, prescription coverage, and potential plan options before the review.

WHAT TO BRING TO YOUR MEDICARE REVIEW

Photo ID

Original Medicare ID Card, if you already have it

Current medication and provider information

Comparing Employer Coverage to Medicare?

Bring your health insurance ID card, employee premium contribution, deductible, common copays, and current prescription costs or copays.

DURING YOUR MEDICARE REVIEW

We will discuss healthcare priorities, budget, preferred doctors and pharmacies, prescription needs, travel, and anticipated healthcare needs.

Clients See What I See. A large monitor mirrors the computer screen throughout the meeting so you can ask questions as we go.

YOUR MEDICARE REVIEW IS A CONVERSATION - NOT A SALES PITCH.

Provider Networks Prescription Coverage Premiums Benefits

Copays Deductibles Maximum Out-of-Pocket Costs

You are my client - not a number. Your understanding of Medicare is my priority. Enrollment happens when you are ready. No sales pressure.