

Pre-appointment CHECKLIST



Before your telephone appointment with one of our Benefits Advisors¹, you'll want to review your guide Making Sense of Medicare and make sure to:



Confirm your account online and complete your personal profile. You can find your personal ID number on the letter included in this package.



Enter the names of your preferred doctors, clinics and hospitals, including phone numbers and addresses.



Enter your prescription drug details, including the name of each medication, dosage and how often you take it.



Check out personalized plan comparisons and recommendations based on your health care needs and budget.

By providing details within your account, you'll get plan recommendations that best match your health care requirements. You can compare and save plans so when you talk with a Benefits Advisor during your telephone appointment, you can get answers and advice on coverage that's right for your needs.



¹ Licensed insurance agents

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