

# New Changes In Medicare Benefits

Hello, I am with The Insurance Advisor. How are you today? Great, I am out here today just to introduce myself. We recently mailed you a card about the **New Changes in Medicare Benefits**. I “service the area” and I have “been assigned to you” as your Health Care Specialist and it’s my job is to deliver the information to you.

Do you recall receiving that card in the mail or mailing that card back in? (Required: Report answer to Home office)

Returned and waiting for information    
  Never received the card    
  May have thrown away

- My job is to make sure you receive the current Updates.
- We work by appointment only.
- Please select the information you would like to receive.

- Explanation of the 3 NEW Approved “Dental, Vision & Tela-Med” plans for Illinois
- See if your current Medicare supplement or Health Care qualifies for a reduction in premium
- Explain the Advantage Plus Benefit, which covers Hospital Co-Pays & Deductibles
- Do you qualify for **any** or **all** of the 6 - Home Owner Tax Exemptions
- Help complete your New HCPD Form - A brief overview of Health Care gaps or concerns
  - See if you qualify for the New Federal L.I.S. Prescription Drug Program
- Receive a “Life Insurance” Policy **update** and **review**
  - Explain “Updated Estate Recovery Mandate”
  - Help order your Current “Life policy value statement”
  - Confirm all policies are accounted for and active with your carriers
  - Help order duplicate policies if lost, for your beneficiary.
- Request a Life Insurance Quote for:    
  Myself    
  Spouse    
  Children    
  Grand Children

## APPOINTMENT CONFIRMATION

❖ What time would work best to deliver and explain the following information? M T W T F \_\_\_a.m. / \_\_\_p.m.

Clients Name: \_\_\_\_\_ D.O.B \_\_\_\_\_ Spouse: \_\_\_\_\_ D.O.B \_\_\_\_\_  
 Address: \_\_\_\_\_ City / ZIP: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Spoke to: \_\_\_\_\_ Date of Appointment: \_\_\_\_\_ Agent Name: \_\_\_\_\_

I am requesting an appointment to receive information on the Updates and New Plans available. **Initial:** \_\_\_\_\_