New Changes In Medicare Benefits

Hello, I'm _____ is _____ home?   How are you today? Great, I am out here today just to introduce myself. I recently mailed you a card about the **New Changes in Medicare Benefits**. I "service the area" and I've 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* "Dental, Vision & Tela-Med" plans available.

☐ 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.

☐ Help complete your *New HealthCare Planning Document* to:
- See if there are gaps or areas of concern in your current benefits
- See if you qualify for the New Federal L.I.S. Prescription Drug Program

☐ Receive a "Life Insurance" Policy **update** and **review**
- See if you're eligible for a reduction of premium or cost of living increase.
- 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

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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:** _____

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