

Medicare appointment

Please fill out this quick checklist before your appointment. This helps your counselor compare your options quickly and accurately.

Date: / /

Basic Information

Name:

Phone Number:

Zip Code:

What to bring

- ☐ Your Medicare card (red, white, and blue card)
- ☐ Any other health insurance cards (such as retiree, advantage, drug plan, Medigap)
- ☐ Your cellphone (needed to log into your account)
- ☐ Your Medicare.gov login information (needed to do a personalized plan search)
- ☐ Prescription medications: Bring your actual prescription bottles OR a typed list showing the exact drug name, dose (mg), and frequency
- ☐ Preferred Providers: A written list of the names and locations of the primary care doctors, specialists, and preferred pharmacies you use.

Optional

Answering these brief questions helps us meet federal program grant requirements and check your eligibility for additional money-saving assistance.

Age range:

- ☐ Under 65 ☐ 65-74 ☐ 75-84 ☐ 85 +

Is English your primary language?

- ☐ Yes ☐ No (Preferred language:)

Military status:

- ☐ Have you or a family member ever served in the U.S. Military?

Race/Ethnicity (select all that apply)

- | | |
|---|--|
| ☐ American Indian or Alaska Native | ☐ Native Hawaiian or Other Pacific Islander |
| ☐ Asian | ☐ White |
| ☐ Black or African American | ☐ Prefer not to answer |
| ☐ Hispanic or Latino | |

Monthly income at or below

- ☐ Individual: \$1,995 / month
- ☐ Married Couple: \$2,704 / month

Assets below (don't count - primary home or vehicle)

- ☐ Individual: \$18,090
- ☐ Married Couple: \$36,100