



## HOW DO I PREPARE FOR MY "CARE AT NO COST" CONSULTATION?

Your 30-45 minute "Care at No Cost" consultation is the first step in helping us understand your needs and healthcare priorities. At the conclusion of our consultation, we will schedule a Plan Enrollment meeting to evaluate your plan options, assist you with plan enrollment, and review your plan benefits for the upcoming year. Please have the following items available and consider the below questions before our initial consultation appointment:

### CHECKLIST

- Red, White and Blue Medicare card (if applicable)
- Membership card for any other insurance you have (Medicare Advantage, Medicare Supplement, Part D, health insurance through an employer, etc.)
- If you would like us to check your medication coverage against plan formularies as well as your current providers (recommended), please bring along a list of your current medications (with quantity and frequency) as well as a full list of your current physicians (PCP, specialists, dentist, etc.). **See attached "Physicians & Medications" Sheet.**

### THINGS TO CONSIDER

1. What do you enjoy about your current plan? What would you add/alter?
2. What is your monthly income?
3. What is your budget?
4. Are there any other benefits that might interest you? (Gym membership, dental/vision/hearing coverage, etc.)
5. Are you the decision maker or does someone help with your healthcare decisions? (If someone assists with your healthcare decisions, please have them be present for our meetings.)



# PHYSICIANS & PRESCRIPTION MEDICATIONS

DOCTOR/SPECIALIST

ADDRESS

SPECIALTY

PCP:		
SPECIALISTS/OTHER:		
DENTIST:		
OPTOMETRIST:		
AUDIOLOGIST:		

MEDICATION NAME

DOSAGE

# OF PILLS / MONTH

PREFERRED PHARMACY:		
SECONDARY PHARMACY:		