



HELPING HANDS FOR SENIOR PLANS

Local Guidance. Personal Care. Peace of Mind.

ANNUAL MEDICARE REVIEW CHECKLIST

A few minutes each year can help ensure your coverage continues to fit your needs.



Doctors & Specialist

- ☐ Have any of my doctors changed?
- ☐ Are my current providers still participating?
- ☐ Have I started seeing any new specialists?



Prescriptions

- ☐ Have any medications changed?
- ☐ Am I using my preferred pharmacy?
- ☐ Am I experiencing higher prescription costs?
- ☐ Are there any new medications I need covered?



Health Changes

- ☐ Have my healthcare needs changed?
- ☐ Have I had any recent surgeries or diagnoses?
- ☐ Am I interested in additional benefits like dental, vision, or hearing coverage?



Budget & Financial Assistance

- ☐ Has my monthly budget changed?
- ☐ Am I concerned about premiums or copays?
- ☐ Have I become eligible for Medicaid or Extra Help?



Life Changes

- ☐ Have I moved or changed counties?
- ☐ Did I retire this year?
- ☐ Did I lose employer coverage?
- ☐ Have there been any major life changes?



Questions for My Agent

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