



Preparing for Your Medicare Appointment

A simple checklist from Atlas Insurance Services, LLC

We want to make your Medicare appointment as helpful and productive as possible. Having a few things ready ahead of time will help your agent understand your needs and discuss the options available to you.

What to Bring

- ☐ **Your Medicare card**
If you already have Medicare, bring your red, white, and blue Medicare card.
- ☐ **A list of medications you want covered**
Include the medication name, dosage, and how often you take it. Bringing the actual prescription bottles is fine, too!
- ☐ **Your doctors and specialists**
Bring the names of the doctors you want to continue seeing, including any specialists.
- ☐ **Your preferred pharmacy**
Let us know where you normally fill your prescriptions.
- ☐ **Your current insurance information**
Bring your current health insurance or Medicare plan card, if applicable.
- ☐ **Information about other coverage you have**
This may include employer or retiree coverage, VA benefits, TRICARE, Medicaid, or other health coverage.
- ☐ **Your questions**
Write them down before your appointment. There are no silly Medicare questions—if something doesn't make sense, ask us!

A Little Preparation Goes a Long Way

Medicare isn't one-size-fits-all. Your doctors, prescriptions, healthcare needs and preferences can all play a role when comparing your options.

Our job is to help you understand those options so you can make an informed decision about the coverage that works for **you**.