

## PRE-SET MEDICARE WITH SOA (FACE TO FACE)

Hi John, this is Mike from Senior services

I am calling regarding the Medicare plan rates and changes in your area and one of our LOCAL Licensed agents will be there to go over the new plans in your county.

The Appointment visit will be on (Propose DATE / DAY / TIME), Okay? *(Get an Affirmative response to be qualify)*

### DISCLAIMER]

(Client Name), for your protection, I do need to inform you that this call will be monitored and recorded, and may be shared with insurance companies who administer plans we offer. Please contact Medicare.gov or 1-800-MEDICARE to get information on all your options”

“Additionally, I want to let you know that the licensed agent offers Medicare Advantage, Medicare supplement, Prescription Drug Plans, and Dental - Vision - hearing plans. I would like your permission to discuss all plans the agent offers to find a plan that fits your needs and your current or future Medicare enrollment status will not be affected. There is no obligation to enroll or enroll you automatically in a plan, IS IT OKAY? *(Get an Affirmative response to be qualify)*

**- Your age is \_ correct?**

**- and you're still residing at** *(Complete address with City, State and Zipcode)*

**- Is there an apartment number** *(If yes, please take note or any identification of the location)*

**Lastly, you both have Medicare parts A&B right and how about Medicaid?** *(Should have Medicare A&B to qualify)*

Great! Please remember that a licensed agent will be there on (Appointment schedule) and answer any questions that you have.

Thank you!