



Senior Insurance & Retirement Advisors

Dear Valued Client,

I hope this letter finds you and your loved ones doing well and staying safe. Medicare Open Enrollment Period this Fall will be **(October 15 - December 7, 2021)** which will be here before we know it. As a result of low vaccination rates and the rise of the COVID-19 Delta Variant in the Panhandle, we will approach open enrollment the same as last year.

Therefore, we are mailing our forms out with this letter, kindly asking you to complete and return them as soon as you receive them. Once we receive your completed forms, we will reach out to you by phone and get your appointment for your annual review set in our Fall calendar. **We are asking that you don't wait to return your forms. We start getting calls from new clients in September and want to make sure we have reserved your appointment time first ahead of those calls.**

Step 1. Complete the enclosed forms.

MEDICARE INFORMATION SHEET

This form enables us to have the most up-to-date client information so we can contact you this upcoming calendar year regarding your insurance. This information is NOT shared with any other entity other than the insurance company you select for your coverage.

SCOPE OF APPOINTMENT FORM

This form is required by Medicare to be completed and signed prior to discussing and reviewing your Part D Drug plan. Certified Medicare Agents are required to keep the completed forms on file for up to ten years.

PRESCRIPTION MEDICATION SHEET

This form outlines for us all of your current medications in detail so we can accurately review your Part D Drug plan for 2022 and assist you in accurately identifying the plan that will keep your out-of-pocket drug costs as low as possible. This form **MUST** be signed and dated at the bottom before returning.

Step 2. For your convenience, return all forms in the postage-paid envelope provided.

Step 3. Wait for our call to schedule your appointment.

Please review the following types of appointments you can choose:



If you choose to have your review conducted over the telephone, you will be called at your set appointment time. Your completed forms will allow us to have all your medications updated so that the annual review appointment is efficient and effective in determining the lowest out-of-pocket for the next calendar year.



If you choose a virtual option for your annual review, you will be furnished by email a link for you to join a virtual meeting with us via Google Meet. This will enable us to share our screen in real-time so you can see each option as we are seeing them on our screen during the appointment. If this option is of interest to you, please make sure to provide an email address on the form you return.



IMPORTANT REMINDER: Please make yourself available **up to 15 minutes before and 15 minutes after** your scheduled appointment time in case the appointment ahead of you runs long or short. We will do our best to stay on schedule and appreciate your cooperation in this process.

Over..

We look forward to hearing from you and assisting you again this year. If you should have any questions or concerns with this letter, the forms, or the open enrollment process, please don't hesitate to call our office at **308-436-9314**. Thank you in advance for your patience and understanding during this open enrollment period as we strive to accommodate everyone safely.

Warmest Regards,

JR Bice & Mardee Downing Bice

Enclosures: 3-Forms & Postage-paid envelope