Medicare Planning Worksheet



Name:	Date:		
What's most important to you in a Medicare plan?			
Premium vs. Out-of-Pocket (check one)			
health care service I use.	ly premium than pay more for each covered		
monthly premium could be lower.	red health care service I use if it means my		
Additional Plan Benefits and Features (check all th	nat are important to you)		
 Prescription Drug Coverage (Part D) Preventive Dental Coverage Eye exam and Eyewear Coverage 	 Hearing Exam and Hearing Aid Coverage Fitness Membership \$0 Routine Physical Exam 		

What providers do you see?

List the doctors, hospitals and clinics you typically visit. This will help us determine if the providers you see are covered by a plan in your area.

Primary Care Provider (general practitioner, family doctor, etc.)

Name:	Location/Clinic:
Specialists (medical specialists, dentist, etc.)	
Name:	Location/Clinic:
Name:	Location/Clinic:
Name:	Location/Clinic:
Hospital	
Name:	

What prescription medications do you take?

Make sure to include the dosage and how often you take the medication.

Medication Name	Dosage	How Often?

What other questions do you have about Medicare?

List your questions and concerns about your Medicare coverage options

Why should I work with an Ulness Health agent?

Expert Help

Our agents have many years of experience with both Medicare Supplements and Medicare Advantage plans. We focus on education and finding the plan that works best for you.

Access to All the Plans

Ulness Health is contracted with every Medicare Advantage plan available in northeast Wisconsin and many of the Medicare Supplement carriers. Save time and stress by comparing plans with us. Do not work with an agent who only sells for one company.

No Cost to You

There is no charge for our services. You will pay the same price for a specific plan regardless of whether you do it yourself or use an agent, so why not have a relationship with a local expert who can advise and assist when help is needed?

Should I call a 1-800 # from a Medicare TV ad?

NEVER! There are a lot of famous athletes and actors starring in TV ads urging you to call their 1-800 # or risk missing out on certain Medicare benefits. DO NOT CALL THOSE NUMBERS! You will regret it. They are not there to help you. They will lie and do everything they can to enroll you in a plan they likely know next to nothing about. If you have questions, call us instead, and we will answer your questions and discuss your options.



About Ulness Health

Ulness Health Insurance Agents are your local health insurance experts serving Appleton, Neenah, Menasha, and the rest of the Fox Cities. Our team provides free, personalized consultations year-round to help you understand and choose the right plan for your needs.