KNESS & ASSOCIATES
Insurance & Investments

Appointment Checklist

Medicare Annual Enrollment Review Period October 15th – December 15th

Annual Medicare Review

- ☐ Bring red, White & blue Medicare card
- ☐ Bring current health coverage card(s)
- ☐ Bring current prescription medication list & Physician list
- ☐ Bring a blank check

Applying for Social Security

- ☐ If you have a social security online account, bring your login & password information and linked device
- ☐ Bring access to your email account (cell phone, laptop, login/password information)
- ☐ Most recent paystub / Wages /current years income (an idea of what you will make for the year)
- ☐ If married: Date & Place of marriage, husband/wife Social Security Number & Date of Birth
- ☐ Bring a blank check

Applying for Medicare Part A & B

- ☐ If you have a social security online account, bring your login & password information and linked device
- ☐ Bring all current medical coverage cards
- ☐ Bring a blank check
- ☐ Bring AARP Membership Card
- ☐ Join AARP
- ☐ Bring current prescription medication list & Physician list

Already have Medicare parts A & B -New to Medicare & first time plan selection

- ☐ Bring red, White & blue Medicare card
- ☐ Bring current health coverage card(s)
- ☐ Bring current prescription medication list & Physician list
- ☐ Bring a blank check