

## 2024 Instructions for Prescription Plan or Medicare Advantage Plan Review

1. Print the Medicare Information Form
2. Fill in all the information
  - a. Prescription Plan Review Only fill out the medication list
  - b. Medicare Advantage Plan Review fill out all the sections
3. Print the Scope of Sales Appointment
  - a. Put your initials in the box
    - i. Prescription Plan Only Review – Stand-Alone Prescription Plan
    - ii. For Medicare Advantage Plan Review – Medicare Advantage Plan
  - b. Sign the first line as the beneficiary
4. Return the forms
  - a. Email to [Patti@2PMinsurance.com](mailto:Patti@2PMinsurance.com)
  - b. Mail to 2PM Insurance Group  
313 Newington Drive  
Hatboro, PA. 19040

Scope of Sales Appointment is the form that tells the Centers for Medicare and Medicaid services that we have your permission to talk to you about different options that will work for you.

The Medicare Information sheet gives us all the information we need to find you a prescription plan or advantage plan that will work for you.

We will contact you with a suggestion of plans that will work for you in 2024.

Special things you need to know about the Annual Election Period:

The Centers for Medicare and Medicaid require us to make the following statement:

“We do not offer every plan available in your area. Currently we represent 15 organizations which offer 40 products in your area. Please contact Medicare.gov, 1-800-MEDICARE, or your local Health Insurance Program to get information on all your options”

We also want you to know that our phone calls are required to be recorded for The Centers for Medicare and Medicaid . This is to protect you and make sure if we get audited, that we are always doing the right thing for you!