EASYPATH ADVISORS

FREE MEDICARE PREPARATION GUIDE

Your Medicare Conversation Checklist

What to gather, what to ask, and what to compare before choosing a coverage path.

PROTECTION TODAY. PEACE OF MIND TOMORROW.

A practical, no-pressure resource from Tenique Brannon, Licensed Insurance Specialist

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Start with the information that shapes your options

Bring the details. Leave with clearer answers.

You do not need to know every Medicare term before asking for help. This checklist simply gives you a place to collect the information that can affect costs, networks, drug coverage, and convenience.

☐ A complete list of your prescription drugs, doses, and how often you take them

☐ The names of your preferred doctors, specialists, hospitals, and pharmacies

☐ Your Medicare card and the start dates shown for Part A and Part B, if already enrolled

☐ Information about current employer, retiree, union, VA, TRICARE, Medicaid, or other coverage

☐ Your ZIP code and any part of the year you live in another state

☐ A realistic monthly budget and any upcoming health or travel needs

Why this matters

Medicare.gov's comparison tools use location, prescriptions, pharmacies, providers, coverage type, and costs to help people evaluate available choices. Bringing accurate details makes the conversation more useful.

Questions worth asking before you decide

Compare the full experience - not just the premium.

- Are my doctors, hospitals, and preferred pharmacies in the plan's network?
- Are all of my prescriptions covered, and are there restrictions or preferred pharmacies?
- What would I pay for premiums, deductibles, copays, coinsurance, and services I use often?
- Do I need referrals or prior authorization for any care I expect to use?
- How does the plan work when I travel or stay outside my home area?
- What extra benefits are included, and what limits or rules apply to them?
- What happens if my health needs, prescriptions, or providers change during the year?
- When can I enroll or make a change based on my specific situation?

A helpful rule

Before canceling or replacing any current coverage, confirm that the new coverage is approved, effective, and understood. Ask how employer, retiree, or other benefits may be affected.

Your comparison page

Write down the details that matter most to you.

Doctors and hospitals		
Prescriptions and pharmacies		
Monthly and annual costs		
Travel and out-of-area care		
Extra benefits and limits		
My biggest question		

Notes for my EasyPath conversation

Ready for clarity?

Bring this checklist to a complimentary conversation with EasyPath Advisors. Call 1-888-450-5051 or visit easypathadvisors.com.

Educational use only. This guide is not a complete description of Medicare benefits, plan availability, or enrollment rules. EasyPath Advisors is not connected with or endorsed by the United States government or the federal Medicare program. For official Medicare information, visit Medicare.gov, call 1-800-MEDICARE, or contact your local SHIP.
Official resources: Medicare.gov/basics/get-started-with-medicare and Medicare.gov/plan-compare