

# My Medicare Checklist

Use this sheet to review your current Medicare Coverage, costs, and next steps.

## My Medicare Basics:

- I have Part A (Hospital)
- I have Part B (Medical)
- I use Original Medicare **only**
- I have a Medicare Advantage (Part C) plan
- My Advantage plan includes Drug coverage
- My doctors are IN-network for my plan
- My plan is **NOT** ending this year
- I have a Medigap (Supplement) plan  
Plan letter (F, G, N, etc.): \_\_\_\_\_
- I also have a separate Part D drug plan
- My doctors accept Medicare

**Part D plan name:** \_\_\_\_\_

Is my Medigap plan premium or Part D Rx plan premium increasing this year?

**Plan name / ID:** \_\_\_\_\_

## My Doctors & Medications:

Primary care doctor: \_\_\_\_\_

Specialist(s): \_\_\_\_\_

Pharmacy: \_\_\_\_\_

**Top Medications (name / dose / est. monthly cost)**  My medication list is up to date for this year

|       |       |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |


## Costs & Protections:

- |                              |          |  |
|------------------------------|----------|--|
| Monthly premiums: Part B     | \$ _____ | <input type="checkbox"/> I know my plan's annual out-of-pocket maximum (If Any)                        |
| Advantage / Medigap          | \$ _____ | <input type="checkbox"/> I checked eligibility for Extra Help (LIS) / Medicaid                         |
| Part D rx plan               | \$ _____ | <input type="checkbox"/> I checked for a Part B premium giveback (MA)                                  |
| Do I have a drug Deductible? | \$ _____ | <input type="checkbox"/> I added gap protection (Hospital Indemnity / Cancer, Heart & Stroke) Coverage |
- I know my copays (PCP, specialist, hospital, ER)

## Actions Before AEP (Oct 15<sup>th</sup> - Dec 7<sup>th</sup> )

- Run a doctor + drug check (formulary & network)
- Compare total annual cost (premium + copays + OOP)
- Review plan changes / notices (ANOC)
- Set a reminder to review options early in AEP

**Need help? Licensed local review — no cost, no obligation.**

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