

NAME: _____

Important: Medicare regulations prohibit the discussion of non-health-related products during Medicare educational events and Medicare sales appointments.

If you would like information about any of the products listed below, *simply check the items that interest you*, and we will contact you to schedule a separate appointment.

☐ **On-Track Retirement Planning**

- Income Planning
- Market Safe Accounts
- Proactive Tax Planning & Tax Free Retirement
- Asset Protection & Estate Planning
- Care Plans for Health & Long-Term Care
- Transparency & Low Investment Fees

☐ **Long Term Care**

- Traditional Long-Term Care Insurance
- Hybrid LTC & Life Insurance
- Annuities with LTC Benefits

☐ **Life Insurance**

- Term Life (1, 5, 10, 15, 20, 25, 30 Years)
- Universal Life (UL, GUL, IUL)
- Whole Life (Final Expense, Traditional)
- Mortgage Protection
- Funeral & Burial Plans

☐ **Disability**

- Individual
- Business Overhead Expense Coverage
- Key Employee

☐ **Employee Benefits**

- Life, Accident, Hospital, Cancer, etc. & Dental & Vision

☐ **Business Owners**

- | | |
|--------------------------------|---|
| ■ Buy-Sell Agreement | ■ Loan Collateral |
| ■ Business Succession Planning | ■ Estate Planning & Succession Planning |
| ■ Key Employee Coverage | ■ Debt Protection |
| ■ Key Person Insurance | ■ Executive Bonus Plans |
| ■ Buy-Sell Agreement Funding | |

☐ **Medicare Advantage Plans**

- Most Plans are Zero Premium
- Extra Benefits (dental, vision, hearing, OTC, gym membership, etc.)
- Network Based
- Plans based on county

☐ **Medicare Supplements**

- Plan G - Pays 100% of Medicare Approved Charges After Part B Deductible
- NO Networks

☐ **Prescription Drug Plans**

- Plans vary based on county and prescriptions

☐ **Health Insurance**

- | | |
|----------------------|--------------------------|
| ■ On / Off Exchange | ■ Christian Health Share |
| ■ Short Term Medical | ■ Group Health |

☐ **Hospital Indemnity Plans**

- Reimburses for Hospital Stays, Ambulance, Emergency Room, etc.

☐ **Critical Illness**

- Cancer, Heart Attack, Stroke, etc.

☐ **Dental, Vision, Hearing**

- Can be Individual or Combined Together

☐ **Accidental Medical / Accidental Death**

- Benefits Paid in the Event of an Accident

☐ **Property & Casualty**

- Personal (Home, Auto, Renters, Umbrella, Motorcycle, Rec. Vehicle, Watercraft, Pet)
- Commercial (Business Auto, General / Professional Liability, Workers Comp, Business Owners Package, Bonds, EPLI)