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Your One-Stop Resource for Long Term Care Planning!

ITEMS TO BRING WITH YOU OR TO HAVE KNOWLEDGE ABOUT FOR THE MEDICARE CONSULTATION APPOINTMENT

You are not required to bring any documents or information with you to the appointment; however, having the information with you OR accessible to you may streamline the appointment/information gathering time.

We look forward to meeting with you. ☺

1.	Demographic information: name, date of birth, marital status, living arrangement (facility name, address, county), phone numbers, email, etc.		
2.	If someone helps you with healthcare decisions, arrange for them to attend the appointment.		
3a.	Information about your current health insurance coverage (bring cards if you have them): --Medicare effective dates including Medicare ID number --Health insurance company name(s) and type(s) of coverage --Eligibility for AHCCCS, Veterans benefits, Tri-care, Indian health services --Current premium amounts paid for all insurance, etc.		
3b.	IF you are on an EMPLOYER PLAN or your EMPLOYER provides a MEDICARE Insurance plan: --Health insurance company name(s) and type(s) of coverage (bring cards if you have them) --Current premium amounts paid --Evidence of Coverage Booklet		
4.	Information about your current health providers including name, address, and phone numbers: --primary care physician --hospital preference --durable medical equipment providers --other doctors' or specialists' --pharmacy preference		
5.	Information about your prescriptions: --name of drug (actual one you take) --how often refilled --dosage of drug (mg, mL, etc.) --how many (pills, chews, etc.) in each refill OR --printout from your pharmacy indicating the information listed above		
6.	Legal Documents: Durable Financial (General) Power of Attorney HIPAA Release forms Durable Healthcare Power of Attorney Guardian/Conservatorship documents		
To determine potential eligibility for Low-Income Subsidy (LIS) or the Medicare Cost-Sharing programs (MCS), you may want to have information pertaining to ...			
7.	Assets (type and value of asset, debt on assets) (ex: financial, investments, and/or retirement accounts, annuities, life/burial insurance, burial plans, businesses, property, vehicles, etc.)		
8.	Income (type of income, amount received, how often received) (example: Social Security, government pensions, retirement pensions, annuities, rental income, earned income, etc.)		
9.	Military service (dates of service, whether or not service was during wartime, honorable discharge)		
10.	Type of work person needing care did for a living (to see if other benefits might be available to you)		



ALTCS Planning

Miller Trusts

Legal Documents

Medicare Insurance

