

INSURANCE ADVISORS

Comprehensive Insurance Planning

Appointment Checklist For On or Off Exchange Policies Sign-up

Documents needed for your appointment:

- Eligibility Letter
- List of doctors you use
- List of hospitals you visit
- List of Rx(s) – drugstores you use
- Copies of tax returns
- Personal identification documents (driver’s license, state residential card), etc.
- Social Security Number

Documents needed for Special Enrollment (outside normal Open Enrollment from 11/1 to 1/31):

- Letters for loss of coverage, if applicable
- Marriage Certificate, if applicable
- Birth Certificate of child, if applicable
- Divorce decree, if applicable
- Death certificate, if applicable

Administrative documents needed for appointment (prepared by Insurance Advisors):

- New Account Worksheet
- 2016 checklist
- Plan details