

* HEALTH INSURANCE *

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As you continue to research affordable health insurance solutions...My Clients have found that, as a broker, my knowledge and representation of more than one company's **major medical** health plans have been invaluable to them, providing confidence and satisfaction as they sought to **optimize benefits with cost across a myriad of companies and their plan choices**. If your goal is to identify the "cheapest" plan, be very careful of quotes for "discount" or limited benefit medical plans.

Needs Assessment...Thank you for the opportunity to serve you. Please complete below, E-mail (or call me), answering the following questions and I will E-mail you a quote(s), optimizing the costs with your required benefits, meeting your expectations on your next visit to see your doctor.

- What is your name? _____
- What is your E-mail address? _____
- What is the best telephone phone number to reach you? _____
- Is the plan just for you? If for other family members, what are their first names?

- What is your home zip code? _____
- What is your birth date...and for anyone else to be on the plan (notate above)? _____
- Do you need maternity coverage? _____
- Do you have any health challenges? ...and for anyone else to be on the plan (notate above)?

- Do you regularly take prescriptions on a daily or weekly basis? _____
- If you or other family members take prescriptions, what is the estimated monthly expense for them?
\$ _____
- If you had a plan that "worked best for you", how often would you visit a doctor each year (e.g. annual physicals, cold, flu, etc.)? _____
- Please provide the name(s) and city (where their office is located) for your current doctor(s).

- Do you have a need for a dental plan? Vision plan? Chiropractic services? Mental health services?
- Do you travel a lot (within the United States) or are you most often in Georgia? _____