

Scope of Sales Appointment Confirmation

In the space provided below, please initial the type of health product(s) you want the agent to discuss.

Medicare Advantage Plans (Part C)

Vision Plans

Stand Alone Prescription Drug Plans (Part D)

Hospital Indemnity

Medicare Supplement Plans

Other Health Products (Please List)

Dental Plans

By signing this form, you agree to a meeting with a sales agent to discuss the types of products you initialed above.

Beneficiary or authorized representative Signature and Signature date:

Signature: _____

Name: _____

Signature Date: ____/____/____

Address: (Street, City, State, Zip) _____

Agent please mail this form to:

MarketPoint
P.O. Box 14637
Lexington, KY 40512-4637

Phone: _____

Relationship to the Beneficiary: _____

To be completed by agent: (Please Print)

Agent Name: Dean Clark

Beneficiary Phone: (Optional) _____

Agent Phone: 281-239-6966

Beneficiary Address: (Optional) _____

Beneficiary Name: _____

Appointment Date: _____

Initial Method of Contact: (Indicate here if beneficiary was a walk-in.)

Agent Book of Business

Walk-in locations:

Agent Contact

Walmart

Market Office

Beneficiary Referral

Other Retail

Other: _____

Agent Referral

Guidance Center

Agents, if the form was signed by the beneficiary at time of appointment, provide explanation why SOA was not documented prior to meeting: _____

Application # - Paper Barcode, MAPA ID or Recording ID: _____

Plan(s) the agent represented: _____

Medicare ID Number: _____

Agent's Signature: Dean Clark

Agent Signature Date: _____

Date Appointment Completed: _____

Agent SAN: 1227716

Humana is a Medicare Advantage organization and a stand-alone prescription drug plan with a Medicare contract. Enrollment in a Humana plan depends on contract renewal. CarePlus is an HMO plan with a Medicare contract. Enrollment in CarePlus depends on contract renewal. Scope of Appointment documentation is subject to CMS record retention requirements.

