Scope of Sales Appointment Confirmation Form

Leslie S. McMillian // leslie@lsminsurance.net // 919.271.6898 // secure portal

Please fill this form out, save, then upload it to our secure document portal.

The Centers for Medicare and Medicaid Services requires agents to document the scope of a marketing appointment prior to any individual sales meeting to ensure understanding of what will be discussed between the agent and the Medicare beneficiary (or their authorized representative). All information provided on this form is confidential and should be completed by each person with Medicare or his/her authorized representative.

Please initial below beside the type of product(s) you want the agent to discuss. A new Scope of Sales Appointment is required if, during an appointment, you request information regarding a different plan type than previously agreed upon.

	Medicare Advantage Plans – Part C – and Cost Plans
	Stand-alone Medicare Prescription Drug Plans – Part D
	Medicare Supplement (Medigap) Products
	Dental and Vision Plans

By signing this form, you agree to a meeting with Leslie McMillan, License 2191889, Broker to discuss the types of products you initialed above. Please note, the person who will discuss the products is either employed or contracted by a Medicare plan. They do not work directly for the Federal government. This individual may also be paid based on your enrollment in a plan. Signing this form does NOT obligate you to enroll in a plan, affect your current or future enrollment, or enroll you in a Medicare plan.

Beneficiary or Authorized Representative (Digital Signature):
Relationship to Beneficiary (if signing as authorized representative):
Today's Date:
Beneficiary Address:

☐ I understand by typing my name, it will act as my electronic signature. I have read and understand the contents of the Scope of Sales Appointment Confirmation Form.

To be Completed by Agent	
Initial method of contact:	
Agent signature:	Agent Phone #: 919-271-6898
List plan(s) the agent represented during this meeting:	
Date Appointment completed:	
Agent, if the form was signed by the beneficiary at the time of the appointment, provide explanation why SOA was not documented prior to the meeting. (Walk-in, late in month, emergency, etc.):	

Note: Scope of Sales Appointment documentation is subject to CMS record retention requirements.