1. Introduction & Confirmation

Agent:

Hi [Name], this is [Your Name], your licensed Medicare specialist with Healthcare Solutions. I just received your request from the Medicare information page—thank you for filling that out.

Just to confirm in case we get disconnected:

I have your phone number as [repeat phone], correct?

And your email as [repeat email], correct?

Perfect. And to make sure I'm serving you correctly—the type of insurance you're looking for is Medicare-related benefits, is that right?

2. Qualification Questions

Excellent, thank you. To get you the most accurate information, may I ask:

- What state are you in?

- And may I ask your age?

Do you currently have any military coverage like VA or Tricare?

3. Expectation Setting

Great. Now, I've already set aside time for us to knock this out right now over the phone. It only takes about 15 minutes, and by the end you'll know exactly what additional benefits you qualify for and what it will cost you—if anything.

Is that fair enough?

4. Health Snapshot (Quick, Relevant Only – for Supplemental Coverage)

Perfect. To make sure I recommend the right carrier and plan, I just need to ask a few quick health questions:

- Do you use any tobacco products?

- Have you had any major health events recently—such as heart attack, stroke, cancer, or hospitalization in the past 12 months?

- What prescriptions are you currently taking?

5. Transition to Benefit Presentation

Based on your answers, you qualify for the additional Medicare benefits in your state.

One of the most valuable is called the Flex Card. Depending on your eligibility, it can provide up to $300 every month you can use toward:

• Groceries

• Utility bills

• Transportation

• Over-the-counter medications

If you don’t have VA or Tricare, you may also be eligible for expanded coverage that includes dental, vision, hearing, and even prescription benefits.

On the supplemental side, you may also qualify for plans such as Medicare Supplement Plan G. This option covers nearly all Medicare-approved expenses—no co-pays, no surprise bills, and freedom to see any doctor who accepts Medicare.

6. Assumptive Close (One-Call Commitment)

Excellent. Let’s check your eligibility and get your application submitted so you can lock in these benefits and coverage.

All I’ll need is:

• Your Medicare card (red, white, and blue card) for the ID number

• Your preferred payment method (most clients use a checking account for automatic monthly payments)

Once we complete this, you’ll have your benefits secured, and I’ll be your dedicated agent if you ever need anything.

Go ahead and grab your Medicare card, and we’ll get this started.