

# **CMS NEW REQUIRED DISCLOSURE**

***"We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact Medicare.gov or 1-800-MEDICARE to get information on all of your options."***

This disclosure is required since we do not offer every plan in your area. Some plans don't allow independent agents to represent them. We do shop for every Part D plan available based on your zip code and using Medicare.gov. We choose to contract with the major players for Medicare Supplement Plans, Medicare Prescription Drug Plans (PDP) and Medicare Advantage Plans (MA-PD).

## **RECORDING OUR CONVERSATIONS**

**Centers for Medicare & Medicaid Services (CMS) is now requiring all phone calls to be recorded when I am speaking with anyone about Medicare Health Plans. My understanding is that I will need your permission to record our calls.**

Our conversation(s) will include Personal Health Information (PHI), Personal Identifying Information (PII) and Prescription Drug Information (PDI). The Health Insurance Portability and Accountability Act (HIPAA) passed by Congress in 1996 already requires that we protect and safeguard this information.

These recordings must be retained by the Agent for 10 years and you may change your mind at any time in the future by requesting a new form.

### **PLEASE INITIAL BELOW:**

\_\_\_\_\_ I agree to recording of our conversations.

\_\_\_\_\_ I do not agree, and I do not want my Agent to record ANY of our conversations.

### **PLEASE SIGN AND DATE BELOW:**

X \_\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Print name \_\_\_\_\_

X \_\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Print name \_\_\_\_\_

Phone number \_\_\_\_\_