

- Agent will see those products the beneficiary wants to discuss, along with any updates.
- Agent also fills out their portion of the SOA form.

Scope of Sales Appointment Form (To Be Completed by Agent)

Scope of Appointment form needs to be completed and submitted for all scheduled appointments (even for no-shows, cancelled appointments, or those that do not result in a sale).

***Agent First Name**

***Agent Last Name**

Agent Phone

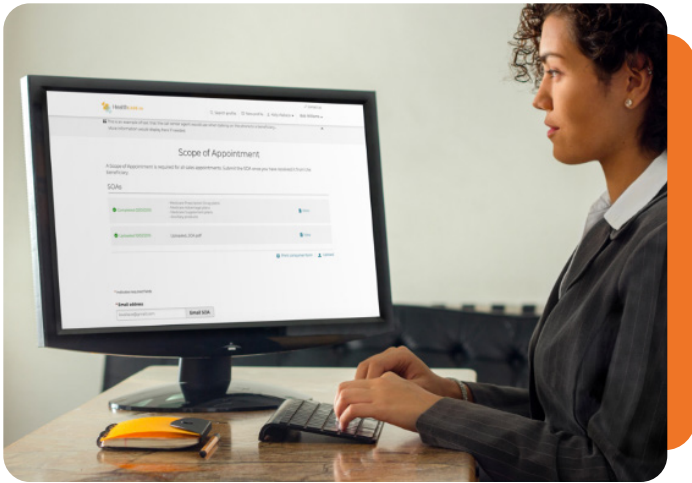
Please enter your 10 digit phone number with no hyphen or spaces (e.g., 2125551212).

***Initial Method of Contact**

If the SOA form was signed by the beneficiary at time of appointment, provide explanation why SOA was not documented prior to the meeting.

***Plan(s) represented during this meeting:**

- Medicare Prescription Drug Plans
- Medicare Advantage Plans



- After the agent completes the SOA, the process is finished. The agent can begin to enroll the customer in their best fit Medicare plan.

Contact Us

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