

Dear Medicare Beneficiary,

We are happy to send you our Medicare Welcome Letter. This means that it is time to review Medicare plans once again. As you may know we are a local Independent Insurance Agency located in downtown Marysville who loves to service our clients and offer the most comprehensive plans on the market.

2019 MEDICARE SEASON
OCTOBER 15th to DECEMBER 7th, 2018

We have attached two forms for you to complete and mail back to our office prior to our meeting...

SCOPE OF APPOINTMENT

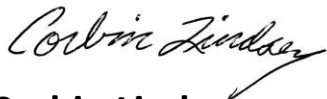
The Scope of Appointment Form is **REQUIRED** by CMS who regulates Medicare for everyone age 65 and older. This form details what we are allowed to discuss with you at our meeting. To make it simple, just INITIAL in all 5 boxes. This form should be Mailed, Faxed or Emailed to our office prior to our scheduled appointment.

MEDICARE QUESTIONNAIRE

This **NON-Required QUESTIONNAIRE** helps us to prepare for your appointment. We will research your doctors, medications and look at the plan options that meet your needs. Our goal is to help you find the Medicare Plan that best fits your lifestyle and budget.

Please complete these forms and send them back to us soon. Each year we receive many referrals from our clients regarding our services and we would like to thank you in advance.

We look forward to servicing you!



Corbin Lindsey

WA Insurance Agent #190780



DID YOU KNOW... We specialize in Retirement and Income Planning, Safe & Risk Money investments.



BIRDSEYE FINANCIAL

INSURANCE - INVESTMENTS - PLANNING

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Welcome to Birdseye Financial

We help individuals, families, and businesses plan for a secure future through education and cutting edge financial strategies. We believe that no two individuals or businesses are alike and for this reason, we are dedicated to giving our clients the personal attention they deserve. Our financial solutions are as unique as our clients.

Birdseye Financial offers a full range of financial products and services. We believe that tax planning strategies, retirement income planning, and estate conservation should be top priorities for individuals and families of all ages and income levels. Because many people regard financial strategies as complex and confusing, they often miss out on many financial strategies that exist for them. They also tend to take unnecessary risks and fail to adequately protect their assets.

Birdseye Financial specializes in estate planning for all sizes of estates, large and small. We help clients look at different methods to help reduce or eliminate unnecessary taxes such as income taxes, social security taxes, and estate taxes. In addition, we help clients avoid probate, increase spendable income, and protect against Medicaid spend-down of assets when Long-Term Care is needed.

BIRDSEYE FINANCIAL SPECIALIZES IN...

INSURANCES*

- **Fixed Index Annuities**
- **Fixed Annuities**
- **Medicare**
- Final Expense
- Long-Term Care
- Life Insurance
- Health Insurance

INVESTMENTS*

- **Market Risk investments**
- Safe Risk Investments
- Traditional IRA's
- ROTH IRA's
- Thrift Savings Plans
- PERS / SERS

PLANNING SERVICES*

- **Retirement & Income**
- **Tax Strategies**
- Pension Maximization
- Social Security Optimize
- Wealth Transfer
- Asset Protection
- Estate Planning

* Investments are managed by Secure Investment Management not Birdseye Financial. Birdseye Financial does not charge a fee for any planning services they offer and does not offer legal or tax advice at any time.



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