Scope of Appointment (2027)

Blank form for a personal Medicare marketing appointment.

Beneficiary
Name: _____
Phone: _____ Address: _____

Agent
Name: _____
Phone: _____ Plan or agency: _____

Appointment date: _____
For contract year 2027 marketing, starting October 1, 2026, the appointment may be any time after this form is completed.

Product types to be discussed (check each one the beneficiary agrees to):
[ ] Medicare Advantage (Part C)
[ ] Medicare prescription drug plan (Part D)
[ ] Medicare Advantage with prescription drug coverage
[ ] Other: _____

There is no obligation to enroll. Current or future Medicare enrollment will not be affected. Automatic enrollment will not occur. A new form is required before discussing a product type that is not checked above.

Beneficiary signature: _____ Date: _____
Agent signature: _____ Date: _____

Elements follow the CMS Medicare Communications and Marketing Guidelines, March 16, 2022. CY2027 timing follows the CMS fact sheet on marketing guideline changes and the April 6, 2026 contract year 2027 final rule. This form is not issued by CMS. Confirm the plan’s own form before use.