



Appointment Checklist

Pennie / Under 65 Health Insurance

- ☐ At least 2 most recent paystubs
- ☐ Most recent federal tax return
- ☐ Investment Distribution Information
- ☐ Social Security Statement
- ☐ Self-Employment Income Documentation/Estimates
- ☐ Current Prescription list
- ☐ Current Physician list
- ☐ Proof of qualified event
- ☐ Names, Dates of Birth, Social Security Numbers

(For All Family Members on Your Tax Return)