



We focus on your medical coverage, so you can focus on what matters most.

With more than 50 years of combined experience, we are a private firm of medical claims and coverage specialists helping ensure individuals of all ages receive the most from their healthcare coverage and benefits. We'll guide you through every step of the billing and insurance process so you can protect what matters most —

your health, your loved ones, and your financial security.

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Thank you for the wise, skillful, careful, diligent, and patient care you give us... you protect our health, guard our resources, and lead us through uncharted territory!

How We Can Help

Annual Election Period for Medicare (AEP)

We'll help you make the most comprehensive coverage choices for your needs every year during the annual Medicare open enrollment period, saving you time and money. Last year our clients saved on average more than \$1,300 when making elections for their 2019 coverage.

Medical claims processing and billing resolution

Send us your medical bills and Explanation of Benefits (EOBs), and we'll take care of the rest! We'll review all of your claims and bills, ensuring they are accurate and appropriately processed and that you're not overpaying for your services.

Transition from group insurance coverage to Medicare

Retiring? Turning 65? We'll help you transition from group coverage to Medicare during the Initial Enrollment Period or a Special Enrollment Period. As a Medicare beneficiary, your healthcare benefits are unique to you, and we'll help determine which plan options fit your needs.

Working with Estates and Guardianships

We are a trusted resource for attorneys, accountants, and trust departments in processing medical paperwork for estates and guardianships. We'll help finalize unresolved claims to ensure estates are closed properly and distributions can be made.

Household Money Management

As a member of the American Association of Daily Money Managers, our specialist can help pay monthly bills, review credit card statements, manage reimbursements, set up a budget, track income and expenses, and more. Let us bring peace of mind to your personal finances!



Next Steps

Your healthcare coverage needs are unique to you, and so is our service. Contact us for a complimentary consultation so we can best serve you.

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