



**7134 N MERLYN PLACE, PAINESVILLE, OH 44077**

Please sign the **Privacy Agreement & Consumer Consent Form** on [lorilipton.com](http://lorilipton.com) by clicking the **Before We Meet** tab and scrolling down to **Preparing For Your Individual & Families Meeting** and clicking **Privacy Agreement & Consent Form**.

### **Things to Bring to ACA/Marketplace/Under 65 Appointments**

Marketplace Plans are guaranteed issued. There is no medical underwriting, only age, zip code and income affect ACA plans. You may want to check your doctors and medications to anticipate upcoming medical costs and assure your physicians are in network.

- Household Adjusted Gross Income:  
Include income for each person on tax return.  
Note: We will need to forecast the adjusted income for the plan year. Last year's adjusted gross income can be found on your last IRS Form 1040. You can also refer to pay stubs, W2, 1099s, Pension, IRA Withdraws, Social Security and Unemployment.
- Doctors: Name and Address
- Medication List: Include Drug Name, Dosage & Frequency
- Residential Address for applicant and each dependent
- Mailing Address
- Birthdays
- SS Numbers
- Citizenship Info if Legal Immigrant
- Current Plan Info

When applying outside of open enrollment, you will need documentation for your special enrollment period (SEP)

- Loss of Coverage Letter from Employer or Insurance Company
- COBRA Notice
- Medicaid Denial Letter
- Change of Address
- Have a Baby
- Get Married/Divorced
- Gain Citizenship
- Release from Incarceration

***FINDING HEALTH PLANS THAT FIT YOUR NEEDS***