



Application for
Medicare Supplement Insurance

Ohio

Agent checklist for completing the Medicare Supplement Application

Please return all pages marked “**RETURN TO COMPANY**” and leave the Outline of Coverage booklet and pages marked “**LEAVE WITH APPLICANT**” with the applicant(s).

Speed up the processing by double checking the following:

- Application’s personal information completed
(DOB, Gender, SSN, Medicare number/dates)
- All dates completed
(Effective dates, signature date)
- Replacement, Investigative Consumer Report Notice/MIB Disclosure Notice,
and Agent Certification forms completed
(Signed & dated and submitted with application)
- Premium and payment information completed
(Modal Premium listed, Bank information complete)
- Prior coverage information completed
(Carrier, plan, start & end dates)

Important Notice:

EFT Premium Payments will be drafted **upon issuance**

PLEASE NOTE — you are also required to provide the applicant(s) with the following items:

- Guide to Health Insurance for People with Medicare
 - Outline of Coverage
-

Mailing Address

Combined Insurance Company of America
PO Box 14207
Clearwater, FL 33766-4207

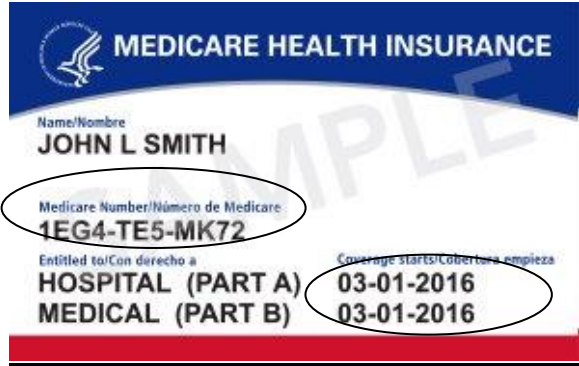
Overnight/Express Address

Combined Insurance Company of America
2650 McCormick Drive, Suite 200T
Clearwater, FL 33759

FAX Number for New Business - ACH Applications 1-866-545-8076

Application For: Medicare Supplement Insurance

SECTION 2. APPLICANT INFORMATION, CONTINUED – PLEASE ANSWER ALL QUESTIONS COMPLETELY
Current Age _____ Date of Birth _____ / _____ / _____ <div style="text-align: center; font-size: small;">mo / day / yr</div>
<input type="checkbox"/> Male <input type="checkbox"/> Female State of Birth _____
Social Security No. _____ - _____ - _____
Please reference your Medicare Card to complete this section.



Medicare Beneficiary Identifier Number (if known)	
E-mail Address	
Height: ___ Ft ___ In Weight: _____ Lbs	
Have you used tobacco in any form in the past 12 months?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Have you received a copy of the Guide to Health Insurance for People with Medicare, the Outline of Coverage and the Notice of Information Practices?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you applying during a guaranteed issue period? (NOTE: If the answer above is "YES," please attach proof of eligibility.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you applying for coverage because you have been diagnosed or treated for End Stage Renal Disease (ESRD) or Kidney Disease requiring dialysis?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No
If you lost or are losing other health insurance coverage and received a notice from your prior insurer saying you were eligible for guaranteed issue of a Medicare Supplement insurance policy, or that you had certain rights to buy such a policy, you may be guaranteed acceptance in one or more of our Medicare Supplement plans. Please include a copy of the notice from your prior insurer with your application.	

Application For: Medicare Supplement Insurance

SECTION 3. FOR YOUR PROTECTION (Continued), Ohio law requests that we ask the following questions about insurance policies or certificates you may have.

(6) Agent shall list any other health insurance policies agent has sold to the applicant.

(a) List policies sold which are still in force.

Name of Company

Plan

Effective Date ____/____/____

(b) List policies sold in the past five (5) years which are no longer in force.

Are you applying during Open Enrollment or a Guaranteed Issue period? If yes, SKIP SECTIONS 4 and 5; GO TO SECTION 6.

SECTION 4. HEALTH QUESTIONS

- If Applicant answers "YES" to any of the following questions 1-13, that person is not eligible for Medicare Supplement Coverage.

1. Are you currently hospitalized, confined to a nursing facility, receiving hospice or home health care; or, are you bedridden or confined to a wheelchair?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Have you been diagnosed with emphysema, Chronic Obstructive Pulmonary Disease (COPD) or other chronic pulmonary disorders?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Have you been diagnosed with Parkinson's Disease, Systemic Lupus, Myasthenia Gravis, Multiple or Lateral Sclerosis, Osteoporosis with fractures, Cirrhosis or kidney disease requiring dialysis?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Have you been diagnosed with Alzheimer's Disease, Senile Dementia, or any other cognitive disorder?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Have you been diagnosed with or treated for Acquired Immune Deficiency Syndrome (AIDS), AIDS Related Complex (ARC), or the Human Immunodeficiency Virus (HIV)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Within the past two years have you been treated for or been advised by a physician to have treatment for internal cancer, alcoholism or drug abuse, mental or nervous disorder requiring psychiatric care or have you had any amputation caused by disease?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Within the past two years have you been treated for or been advised by a physician to have treatment for heart attack, heart, coronary or carotid artery disease (not including high blood pressure), peripheral vascular disease, congestive heart failure or enlarged heart, stroke, transient ischemic attacks (TIA) or heart rhythm disorders?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Within the past two years have you been treated for degenerative bone disease, crippling/ disabling or rheumatoid arthritis or have you been advised to have a joint replacement?	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Have you been advised by a physician that surgery may be required within the next 12 months for cataracts?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Have you been advised by a physician to have surgery, medical tests, excluding HIV, treatment or therapy that has not been performed?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No
11. Have you been hospital confined three or more times in the last two years?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No
12. Have you had an organ transplant or been advised by a physician to have an organ transplant?..	<input type="checkbox"/> Yes <input type="checkbox"/> No
13. Do you have diabetes that requires insulin?.....	<input type="checkbox"/> Yes <input type="checkbox"/> No

Application For: Medicare Supplement Insurance

SECTION 4. HEALTH QUESTIONS (Continued)

- If Applicant answers "YES" to any of the following questions 1-13, that person is not eligible for Medicare Supplement Coverage.

14. Do you have diabetes that is treated by medication or by diet? If yes, as a result of your diabetes do you have;	<input type="checkbox"/> Yes <input type="checkbox"/> No
A. Numbness in your hands, feet or legs?	<input type="checkbox"/> Yes <input type="checkbox"/> No
B. Eye disorder?	<input type="checkbox"/> Yes <input type="checkbox"/> No
C. Kidney problems?	<input type="checkbox"/> Yes <input type="checkbox"/> No
D. Circulatory or peripheral vascular disease?	<input type="checkbox"/> Yes <input type="checkbox"/> No
E. Skin ulcers?	<input type="checkbox"/> Yes <input type="checkbox"/> No
F. Amputation(s)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
(If applicant answers "YES" to any of questions A-F then applicant is not eligible for coverage.)	

To the best of your knowledge, within the past two (2) years have you had any medical advice, including referrals to other physicians for diagnostic test(s) (excluding HIV and AIDS) and surgery or treatment from a member of the medical profession, for any other condition not listed in section 4? Yes No

(please attach a separate sheet if needed)

Specific Condition	
Type of Treatment	
Dates of Diagnosis	Begin: ___/___/___ End: ___/___/___ (leave blank if current)
Specific Condition	
Type of Treatment	
Dates of Diagnosis	Begin: ___/___/___ End: ___/___/___ (leave blank if current)
Specific Condition	
Type of Treatment	
Dates of Diagnosis	Begin: ___/___/___ End: ___/___/___ (leave blank if current)
Specific Condition	
Type of Treatment	
Dates of Diagnosis	Begin: ___/___/___ End: ___/___/___ (leave blank if current)

Application For: Medicare Supplement Insurance

SECTION 5. MEDICATION INFORMATION

Are you taking or have you taken any prescription or over-the-counter medications within the past 12 months?
 If "YES," please list the drug and the condition in the following table.

Yes No
 (please attach a separate sheet if needed)

Medication Name (as shown on label)	
Date Originally Prescribed	___/___/___
Frequency and Dosage	
Diagnosis/Condition	
Medication Name (as shown on label)	
Date Originally Prescribed	___/___/___
Frequency and Dosage	
Diagnosis/Condition	
Medication Name (as shown on label)	
Date Originally Prescribed	___/___/___
Frequency and Dosage	
Diagnosis/Condition	
Medication Name (as shown on label)	
Date Originally Prescribed	___/___/___
Frequency and Dosage	
Diagnosis/Condition	

Application For: Medicare Supplement Insurance

SECTION 6. METHOD OF PAYMENT – PLEASE COMPLETE ALL QUESTIONS

IMPORTANT: When choosing to pay initial premium by Automated Bank Account Withdrawal,
THE FIRST PREMIUM WILL BE WITHDRAWN FROM YOUR ACCOUNT IMMEDIATELY
WHEN YOUR POLICY IS ISSUED.

The first withdrawal date may be different from the monthly date selected for renewal premiums. Subsequent premiums will be withdrawn approximately thirty (30) days from the effective date of coverage or on the date specified on this application.

I authorize Combined Insurance Company of America to withdraw funds from my account for my initial and/or monthly renewal premiums and understand that the amounts may differ. Premium shortages may result from a variety of causes I authorize you, my financial institution, to pay from my account to “Combined Insurance Company of America” any preauthorized electronic fund transfers. Your rights with each charge will be the same as if personally paid by me. The authorization will be effective until I give you at least three business days’ notice to cancel. If notice is given verbally, you may require written confirmation from me within 14 days after my verbal notice.

I would like my automatic monthly withdrawal to come from my (check one below) on the _____ day (must be between the 1st and 28th) of the month:

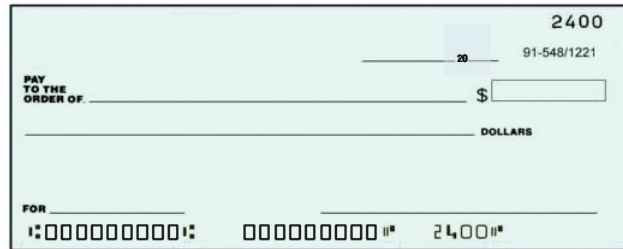
Checking

Please attach a voided check

Savings

Please ask your financial institution to verify that this EFT will be accepted and that the information below is correct.

- Payments cannot be postponed from the date selected.
- Payment from a third party, including any foundation, will not be accepted.
- All refunds will be made to the applicant in the event of rejection, incomplete submission, overpayment, cancellation, etc.



Routing Number Account Number Check Number

(9 digits)

Financial Institution Name:

Phone #:

Financial Institution Address:

Transit Routing # (from left side of check):

Account # (from right side of check)

X _____
 Authorized Signature as Shown on Account

_____/_____/_____
 Date

Application For: Medicare Supplement Insurance

SECTION 7. AUTHORIZATION AND ACKNOWLEDGEMENT

IMPORTANT STATEMENTS TO BE READ BY APPLICANT

- You do not need more than one Medicare Supplement policy.
- If you purchase this policy, you may want to evaluate your existing health coverage and decide if you need multiple coverages.
- You may be eligible for benefits under Medicaid and may not need a Medicare Supplement policy.
- If, after purchasing the policy, you become eligible for Medicaid, the benefits and premiums under your Medicare Supplement policy can be suspended, if requested, during your entitlement to benefits under Medicaid for 24 months. You must request this suspension within 90 days of becoming eligible for Medicaid. If you are no longer entitled to Medicaid, your suspended Medicare Supplement policy (or, if that is no longer available, a substantially equivalent policy) will be reinstated, if requested, within 90 days of losing Medicaid eligibility. If the Medicare Supplement policy provided coverage for outpatient prescription drugs and you enrolled in Medicare Part D while your policy was suspended, the reinstated policy will not have outpatient prescription drug coverage, but will otherwise be substantially equivalent to your coverage before the date of the suspension.
- If you are eligible for and have enrolled in a Medicare Supplement policy by reason of disability and you later become covered by an employer or union-based group health plan, the benefits and premiums under your Medicare Supplement policy can be suspended, if requested, while you are covered under the employer or union-based group health plan. If you suspend your Medicare Supplement policy under these circumstances and later lose your employer or union-based group health plan, your suspended Medicare Supplement policy (or, if that is no longer available, a substantially equivalent policy) will be reinstated, if requested, within 90 days of losing your employer or union-based group health plan. If the Medicare Supplement policy provided coverage for outpatient prescription drugs and you enrolled in Medicare Part D while your policy was suspended, the reinstated policy will not have outpatient prescription drug coverage, but will otherwise be substantially equivalent to your coverage before the date of the suspension.
- Counseling services may be available in your state to provide advice concerning your purchase of Medicare Supplement insurance and concerning medical assistance through the state Medicaid program, including benefits as a Qualified Medicare Beneficiary (QMB) and a Specified Low-Income Medicare Beneficiary (SLMB).

I authorize Combined Insurance Company of America or its reinsurers for the purpose of evaluating this application for insurance to acquire, review, research the release of information from any of the following: Hospital; Physician; Medical Practitioner; Clinic; Pharmacy; Pharmacy Benefits Manager or other pharmacy-related services organization; Health Plan; other medical or medically related facilities; Government Agency; (MIB) Inc.; Consumer Reporting Agency; Combined Insurance's own records; and I authorize any of the foregoing parties that have any records or knowledge of me or my protected health information to give to Combined Insurance or its reinsurers, any such information. Combined Insurance Company of America will acquire through a personal phone interview or another means from the above any needed information on the Insured, his/her dependents including but not limited to copies of records, concerning advice, care or treatment, on past or present health, the use of drugs or alcohol, and information relating to mental illness. I also authorize Combined Insurance Company of America or its reinsurers to disclose all such information to any doctor, the MIB, Inc. or any other insurance company in order to evaluate a claim or an application for insurance. I authorize Combined Insurance Company of America, or its reinsurers to make a brief report of my protected health information to MIB Inc. Federal and state laws protect the information disclosed pursuant to this authorization. I understand that any disclosure of information carries with it the potential for any unauthorized re-disclosure and the information may not be protected by the federal confidentiality rules. I understand this consent may be revoked in writing at any time, with the exception to the extent that disclosure of information has already occurred prior to the receipt of revocation by the above named provider. If written revocation is not received, authorization will be considered valid for a period of two years from the date of signing. A photocopy of this authorization will be as valid as the original. A copy of the authorization is available to you or your representative upon request to the Company. Failure to sign this authorization may impair the ability of Combined Insurance to evaluate or process this application and may be a basis for denying this application.

Any person who, with intent to defraud or knowing that he is facilitating a fraud against an insurer, submits an application or files a claim containing a false or deceptive statement is guilty of insurance fraud.

To the best of my knowledge and belief, I wish to apply for a Medicare Supplement insurance policy. I represent that my answers and statements on this application are true and complete. I understand that, (a) upon acceptance of the completed application, each applicant will receive a separate policy; (b) my policy benefits can start no earlier than my Medicare effective date, my first month's premium has been received and/or processed and my application has been approved by Combined Insurance Company of America.

Dated at _____, on _____ / _____ / _____
City State mo / day / yr Applicant's Signature

Combined Insurance Company of America
Administrative Office
PO Box 14207 • Clearwater, FL 33766-4207
Toll-free: 855-278-9329 • www.combinedinsurance.com

**NOTICE TO APPLICANT REGARDING REPLACEMENT
OF MEDICARE SUPPLEMENT INSURANCE OR MEDICARE ADVANTAGE**

SAVE THIS NOTICE! IT MAY BE IMPORTANT TO YOU IN THE FUTURE.

According to your application, you intend to terminate existing Medicare Supplement or Medicare Advantage insurance and replace it with a policy to be issued by Combined Insurance Company of America. Your new policy will provide thirty (30) days within which you may decide, without cost, whether you desire to keep the policy.

You should review this new coverage carefully. Compare it with all accident and sickness coverage you now have. If, after due consideration, you find that the purchase of this Medicare Supplement coverage is a wise decision, you should terminate your present Medicare Supplement or Medicare Advantage coverage. You should evaluate the need for other accident and sickness coverage you have that may duplicate this policy.

STATEMENT TO APPLICANT BY ISSUER, AGENT

I have reviewed your current medical or health insurance coverage. To the best of my knowledge, this Medicare Supplement policy will not duplicate your existing Medicare Supplement or, if applicable, Medicare Advantage coverage because you intend to terminate your existing Medicare Supplement coverage or leave your Medicare Advantage plan. The replacement policy is being purchased for the following reason(s):

- Additional benefits.
- No change in benefits, but lower premiums.
- Fewer benefits and lower premiums.
- My plan has outpatient drug coverage and I am enrolling in Part D.
- Disenrollment from a Medicare Advantage plan. Please explain reason for disenrollment.

- Other. (Please specify)

1. State laws provide that your replacement policy or certificate may not contain new pre-existing conditions, waiting periods, elimination periods or probationary periods. The insurer will waive any time periods applicable to pre-existing conditions, waiting periods, elimination periods or probationary periods in the new policy (or coverage) for similar benefits to the extent such time was spent (depleted) under the original policy.

2. If you still wish to terminate your present policy and replace it with new coverage, be certain to truthfully and completely answer all questions on the application concerning your medical and health history. Failure to include all material medical information on an application may provide a basis for the company to deny any future claims and to refund your premium as though your policy had never been in force. After the application has been completed and before you sign it, review it carefully to be certain that all information has been properly recorded.

Do not cancel your present policy until you have received your new policy and are sure that you want to keep it.

(Signature of Agent, Broker, or other Representative)*

(Typed Name and Address of Issuer, Agent, or Broker)

Applicant's Signature

Date

*Signature not required for direct response sales.

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- Other. (Please specify)

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(Signature of Agent, Broker, or other Representative)*

(Typed Name and Address of Issuer, Agent, or Broker)

Applicant's Signature

Date

*Signature not required for direct response sales.

Combined Insurance Company of America

Administrative Office • PO Box 14207, Clearwater, FL 33766-4207

INVESTIGATIVE CONSUMER REPORT NOTICE TO APPLICANT

Federal law requires that notice of investigation be given to persons applying for insurance. In making this application for insurance to Combined Insurance (the Company), it is understood that an investigative consumer report may be prepared whereby information is obtained through personal interviews with your neighbors, friends, or others with whom you are acquainted. This inquiry includes information as to your character, general reputation, personal characteristics, and mode of living (the term "mode of living" does not relate directly or indirectly to the sexual orientation of any proposed insured). You may request to be interviewed for the consumer report. You may, upon written request, be informed whether or not the report was ordered, and if so, the name and address of the consumer reporting agency which made the report. Upon proper identification, you have the right to inspect and/or receive a copy of the report from the consumer reporting agency. You have the right to make a written request to the Company within a reasonable period of time to receive additional detailed information about the nature and scope of the investigation. Write to: Underwriting Department, Combined Insurance, PO Box 14207, Clearwater, Florida, 33766-4207.

MEDICAL INFORMATION BUREAU DISCLOSURE NOTICE

Information regarding your insurability will be treated as confidential. Combined Insurance (the Company) or its reinsurer(s) may, however, make a brief report thereon to the MIB, Inc., formerly known as Medical Information Bureau, a not-for-profit membership organization of insurance companies, which operates an information exchange on behalf of its members. If you apply to another MIB member company for life or health insurance coverage, or a claim for benefits is submitted to such a company, MIB, upon request, will supply such company with the information about you in its file. Upon receipt of a request from you, MIB will arrange disclosure of any information in your file. Please contact MIB at 866-692-6901 (TTY 866-346-3642). If you question the accuracy of the information in MIB's file, you may contact MIB and seek a correction in accordance with the procedures set forth in the Federal Fair Credit Reporting Act. The address of MIB's information office is 50 Braintree Hill Park, Suite 400, Braintree, Massachusetts 02184-8734. The Company or its reinsurer(s) may also release information from its file to other insurance companies to whom you may apply for life or health insurance, or to whom a claim for benefits may be submitted. Information for consumers about MIB may be obtained on its website at www.mib.com.

MEDICARE SUPPLEMENT INITIAL PREMIUM RECEIPT

MAKE CHECK PAYABLE TO: COMBINED INSURANCE

Receive from _____ (Proposed Insured) an application for a Medicare Supplement Policy with Combined Insurance (the Company), and \$ _____ for the initial premium. In the event the application is not accepted by the Company, the above amount will be refunded. No obligation is incurred by the Company unless said application is approved by the Company at its Administrative Office and a policy issued.

Agent's Name (please print)

Agent's Signature

Date

LEAVE WITH APPLICANT

Agent Certification



COMBINED INSURANCE

Administrative Office • PO Box 14207, Clearwater, FL 33766-4207
1-855-278-9329

I, the undersigned insurance agent, certify:

THAT I have taken an application for:

PRIMARY INSURED:

Medicare Supplement Standard

- Plan A
- Plan F
- Plan G
- Plan N

Offered by COMBINED INSURANCE,

to _____
(Applicant(s)),

THAT I have explained the provisions of the policy being applied for, including specifically, all the different benefits, exceptions and limitations of the plan.

THAT I am a licensed agent of this insurance company and have given a company receipt for an initial premium in the amount of

\$ _____ which has been paid to me by

- Check
- ACH (*Check appropriate method of payment*)

THAT I have clearly explained that any benefits of this plan are a supplement to any benefits that the applicant may be entitled to receive from the Medicare Program of the federal government.

THAT I have not made any representation to the applicant that there is any endorsement whatsoever by the Social Security Administration or the Centers for Medicare and Medicaid Services in connection with this insurance policy being applied for.

Date

Signature of agent

Name of agency

Signature of applicant A

Address of agent/agency

RETURN TO COMPANY

Combined Insurance Company of America

TO BE COMPLETED BY AGENT

I, the Insurance Agent or Broker Certify:

- That, I am an insurance agent or broker.
- That, I am making the solicitation or sale on behalf of Combined Insurance Company of America.
- That, I met with _____ (Agent Print Customer's Name) for the purposes of providing him/her with information about the Company's products and/or review his/her current Combined Insurance coverage. None of these products or policies included Medicare supplement or Medigap insurance, or another accident or sickness product designed to supplement Medicare benefits.
- That, Mr./Ms. _____ (Agent Print Customer's Last Name) informed me that he/she was eligible to participate in Medicare. I then presented him/her with this form.
- That, I have no connection or affiliation with, and are not in any way sponsored by, the federal or state government, the social security administration, the centers for Medicare and Medicaid services, or the department of health and human services.

Agent Name _____ Agent Phone No. _____

Address of Agent _____

Name of Agency _____ Phone No. _____

Address of Agency _____

TO BE COMPLETED BY CUSTOMER

I, _____ the Applicant understand that I have a right to:

Verify the information above by contacting the Ohio Department of Insurance;

Ohio Department of Insurance
50 W. Town Street, Third Floor - Suite 300
Columbus, Ohio 43215

Contact the agent or broker making the solicitation or sale at both an address and telephone number provided by the agent or broker;

Contact the insurance company or insurance companies on behalf of which the solicitation or sale was made at an address and telephone number provided by the agent or broker;

Pay my premium(s) directly to the insurance company, if I purchase a Medicare supplemental insurance policy.

I understand and agree that (please check all that apply):

___ Certain unsolicited contacts with Medicare eligible Ohio residents are prohibited;

___ Mr./Ms. _____ (Print Agent's Name) did not contact me for the purpose of selling Medicare, Medigap or similar insurance;

___ I am interested in learning more about Combined Insurance Medicare supplement products; and

___ I wish to obtain more information on these plans during this visit.

CUSTOMER SIGNATURE: _____ Date _____

Form Number _____

Combined Insurance Company of America

Consumers choosing to have initial premiums paid through ACH (Automated Clearing House) for Medicare Supplement Applications may have their initial premium automatically deducted from their checking or savings account through the Electronic Funds Transfer (EFT) process. When they do, you may fax the application and required forms instead of mailing them.

Follow these easy steps to submit Medicare Supplement applications using ACH for the initial premium:

STEP 1 – COMPLETE THE AUTHORIZATION FOR ELECTRONIC FUNDS TRANSFER SECTION ON THE APPLICATION.

Applicants wishing to pay electronically will need to complete the appropriate Medicare Supplement Authorization for Electronic Funds Transfer section on the application and include a voided check.

STEP 2 – FAX THE FOLLOWING ITEMS TO THE DEDICATED LINE FOR ACH PAYMENTS AT 1-866-545-8076

- 1) ACH fax transmittal cover sheet on the back of this form
- 2) Medicare Supplement Application and other required forms including authorization for EFT
- 3) Voided check for EFT

If you fax the application, do not mail it, as processing errors occur and additional charges could result from the duplication.

For producer use only. Not for use with the general public.

