



CORNERSTONE
RETIREMENT PARTNERS

2024 Annual Election Period (AEP) Checklist

I. Scope of Appointment – One Per Person

Return the completed form including your signature prior to September 1 or you **must** provide 48 hours in advance of a scheduled appointment.

Response Methods:

1. Print the Scope of Appointment at www.nancycourser.com/aep, sign and date, and return via:
 - a. Email to AEP@cornerstone-rp.com
 - b. Mail to: Beka Liu
Cornerstone Retirement Partners
2900 Charlevoix Dr SE, Suite 310
Grand Rapids, MI 49546
 - c. Fax to 616-301-2593
 - d. Drop off at our office.
2. Send an email to AEP@cornerstone-rp.com to request a digital copy be sent to you to sign and return electronically.
3. Request a paper copy be mailed to you to complete and return.

II. Prescription and Provider Information – One Per Person

Provide a list of medications, providers and pharmacy for input into our database. If you don't take any medications today, please let us know, and also supply your provider (primary care, specialists, dentist) information.

Response Methods:

1. Click this link, www.nancycourser.com/RX, and fill out any medications that you are currently taking and your preferred pharmacy, as well as any providers that you see.
2. Send us a written list of your prescriptions and doctor(s) **using one of the response methods listed in item 1 under Scope of Appointment:**
 - a. Include: prescription name, dosage, times taken per day, and frequency filled
 - b. Include: your preferred pharmacy, if you have one
 - c. Include your providers: primary care, specialists, dentist
3. If you've provided your Medicare.gov information in the past, we will contact you directly to update your list for input into the database.
4. If you only have 2-3 prescriptions, please feel free to call us at the phone number listed below.

III. Schedule A Review Appointment - Do It Your Way: In office, Phone, or Zoom

1. Call 616-301-2581, extension 2 or 3.
2. Request a Consultation on the website at www.nancycourser.com.