

Medicare needs assessment (for prospects)

11/09/2023

Personal info

Email	demo@sparkadvisors.com
Mobile phone	N/A
Home phone	(415) 555-5555
Home address	212 Broadway, Newburgh, NY 12550
First name	Betty
Middle name / MI	N/A
Last name	Crocker
Preferred name	Betty
Birthdate	01/01/1950
Medicare number	ASDF-ASD-FAAA
Part A effective	04/01/2023
Part B effective	N/A

 **Benefits & utilization**

Type of current plan: N/A

Veteran / spouse	No
Veteran benefits	N/A
Medicaid	No
Extra assistance	No

Rx Current prescriptions

bupropion hydrochloride | 150 MG extended release oral tablet | 30 every month

Ozempic | 1.34 MG/ML pen injector | 10 every month

Rx Local pharmacy

CITY DRUG | 324 MAIN ST, POUGHKEEPSIE 12601

Rx Mail order pharmacy

N/A

 **Primary care physician**

SARAH D SMITH | Psychologist

 **Specialist**

DR. SANDRA R SMITH | Physical Therapist