

Your Medicare Checklist

Working past 65? Starting to think about Medicare?
Use our checklist to help you prepare for Medicare.



6 MONTHS PRIOR TO YOUR 65th BIRTHDAY

- ☐ Meet with your dedicated Medicare Choice Group advisor to plan your Medicare transition timeline.
- ☐ Attend our "Understanding Medicare Coverage" webinar to learn about the fundamentals of Medicare.
- ☐ Compile a current list of healthcare providers and medications to more accurately project cost and access to care.

3-4 MONTHS PRIOR TO YOUR 65th BIRTHDAY

- ☐ Schedule your one-on-one consultation with a Medicare Choice Group advisor to review your Medicare options.
- ☐ Compare your current health plan costs to your projected Medicare costs.
- ☐ With assistance from your advisor, determine whether a Medicare transition is advantageous from a cost and benefit perspective.

1 MONTH PRIOR TO YOUR 65th BIRTHDAY

- ☐ Confirm your enrollment info Medicare Part A & B.
- ☐ Enroll in a Medicare Supplement and Part D plan, or a Medicare Advantage plan with assistance from your Medicare advisor.
- ☐ Confirm your Medicare health plan enrollment is approved before cancelling any previous coverage.

ANNUAL ENROLLMENT PERIOD (OCT 15th – DEC 7th)

- ☐ Schedule an appointment with a Medicare Choice Group advisor to re-evaluate your current coverage for the next calendar year.
- ☐ Review your plan's Annual Notice of Changes (ANOC) document outlining changes to your Medicare plans for the next calendar year.
- ☐ If there is interest, review alternate plan options and complete the enrollment process with your Medicare advisor's assistance.



Schedule your FREE Medicare consultation today!

<https://visit.medicarechoicetagroup.com/merakey>

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