

# RETIRING-TO DO LIST

	DUE DATE	WHAT	WHERE	IN PROGRESS?	DONE-CIRCLE WHEN COMPLETE
Priority	Open	<b><u>Retiring or will continue to work</u></b> and are already 65 or older.	Are you on employer group health plan? In HSA?	Yes No	Yes
Priority	3 to 12+ months prior to retirement	Set first meeting with Mike to review Medicare, your priorities, talk about enrolling in Part A and or Part B and HSA end date.	Your office or a quiet and convenient location.	Yes No	Yes
Priority	3-6 months prior to retirement date	Sign up for Medicare Part A and or B either online or set an appointment with Social Security. <b>Due to COVID, you will need to set a telephone appointment with Social Security to enroll into Parts A&amp;B.</b> Contact HR for Letter of Creditable Coverage. Stop HSA contributions six months earlier.	<a href="http://www.socialsecurity.gov">www.socialsecurity.gov</a> . Contact your HR/Benefits Dept.	Yes No	Yes
Priority	At least 4 weeks prior to retiring	Make decision which option best fits your needs. Medicare Supplement and PDP or Medicare Advantage where available.	After 1 <sup>st</sup> meeting	Yes No	Yes
Priority	At least 4 weeks prior to retirement date	Set time and location for 2 <sup>nd</sup> meeting to complete enrollment form(s). <b>Due to COVID, most enrollments are now done electronically online.</b>	Your office or a quiet and convenient location.	Yes No	Yes
Priority	At 2 <sup>nd</sup> meeting	<b>Bring your Medicare Card, your Letter of Creditable Coverage along with a voided check. I will submit all paper work for you.</b>	At the 2 <sup>nd</sup> meeting place	Yes No	Yes
Priority	Please	<b>If you procrastinate on enrolling into Parts A &amp; B or don't stop your HSA contributions six months prior, problems can or will occur.</b>	First meeting	Yes No	Yes
Must	Open	<b>Do not cancel any current health insurance coverage until new Medicare coverage is in effect.</b>	First meeting	Yes No	Yes

**NOTES:**

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