

TURNING 65-TO DO LIST

	DUE DATE	WHAT	WHERE	IN PROGRESS?	DONE- CIRCLE WHEN COMPLETE
Priority	3 months prior to turning 65	Turning 65 you need to sign up for Medicare Parts A&B. Either online at the website listed or set an appointment with your local Social Security office. Update: Due to COVID 19 enrollment will be via a scheduled telephone appointment with your local Social Security office.	www.socialsecurity.gov	Yes No	Yes
Priority	At least 3 months prior to turning 65	Set first meeting with Mike to review Medicare and your healthcare priorities.	A quiet and convenient location.	Yes No	Yes
Priority	At least 4 weeks prior to turning 65	Make decision on which option best fits your needs. Medicare Supplement and PDP or Medicare Advantage where available.	After 1 st meeting	Yes No	Yes
Priority	At least 4 weeks prior to turning 65	Set time and location for 2 nd meeting to complete enrollment form(s). Update: Due to COVID19 Enrollments will be conducted electronically.	A quiet and convenient location.	Yes No	Yes
Priority	At 2 nd meeting	Have your Medicare Card, your, copy of front and back of current health ID card along with a voided check. I will submit all paper work for you.	At the 2 nd meeting place	Yes No	Yes
Priority	First meeting	If you procrastinate on enrolling into Parts A & B or don't stop your HSA contributions six months prior, problems can or will occur.		Yes No	Yes
Must	First meeting	Do not cancel any current health insurance coverage until new Medicare coverage is in effect.		Yes No	Yes

To do list

NOTES:

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