



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 Election 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.

We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact Medicare.gov or 1-800-MEDICARE to get information on all of your options. CA License 6001510

Schedule your FREE Medicare consultation today!

<https://visit.medicarechoicegroup.com/worthington>

 855-626-7127