



Your “Turning 65” Checklist

Brought to you by [medicarehealthplans.com](https://www.medicarehealthplans.com),
your trusted resource for all things Medicare.



With your 65th birthday coming up, get all your Medicare ducks in a row. This "Turning 65" Checklist helps you do just that, providing you with specific tasks that prepare you to enroll in a Medicare plan when the time comes.

9 months before your 65th birthday:

❑ Find out if you qualify for Medicare benefits

This is your Medicare starting line. Determine if you're eligible for Medicare benefits through multiple outlets—by calling Social Security at 1-800-772-1213, visiting your local Social Security Office, or visiting [Medicare.gov](https://www.Medicare.gov). Find out if you will automatically enroll in Medicare Part A and/or Part B and how much your premiums will be.

❑ Determine your work, retirement, and social security situations

Are you planning on working past your full retirement age? Are retirement funds sufficient for what you want your lifestyle to be for the next few decades? How are you going to approach your Social Security benefits? Figure these things out a year in advance, and you'll be well prepared once your Initial Enrollment Period (IEP) for Medicare rolls around.

❑ Review your current insurance situation and determine if you're eligible for Medicare

If you have existing insurance coverage through your employer, enrolling in Medicare may impact the coverage you receive. Your employer can change your premiums, benefits, or even cancel coverage once you enroll in Medicare. Make sure you speak with your employer to ensure there aren't any hiccups in the process.

6 months before your 65th birthday:

□ Research your Medicare plan options

Give yourself plenty of time to research all of the Medicare options at your disposal. Are you looking for something more than what Original Medicare offers? You may want to look into a Medicare Advantage plan. Want a plan that will cover your medications throughout the year? Check out Medicare Part D plans. At [medicarehealthplans.com](https://www.medicarehealthplans.com), we offer unbiased information on each of these plans so you can make an informed decision when the time comes.

□ Contact your doctor

- Schedule a complete physical exam, even if you're feeling healthy. This exam helps determine what kind of Medicare plan you may need in the future.
- Ask your doctor if they accept Original Medicare and/or Medicare Advantage. This will help you narrow down your Medicare options so that you can keep your doctor for future appointments.

3 months before your 65th birthday:

□ Your Initial Enrollment Period begins—enroll in a Medicare plan

You've done all the research—now it's time to take your pick! If you are retired, find out if you were automatically enrolled in Original Medicare. During this period you can enroll in Original Medicare as well as other Medicare plans, including Medicare Advantage, Medicare Supplement, and Medicare Part D (prescription drug plan). Call [medicarehealthplans.com](https://www.medicarehealthplans.com) at 1-(833) 488-0036 to get started on your enrollment!

Your 65th birthday and/or three months after:

□ Celebrate good times—assuming you've already enrolled in a Medicare plan

Time to party like it's the 1960s—that is if you've finished your enrollment process. Luckily, you have three months after your birthday to enroll in a Medicare plan if you still need the extra time. After all, making sure you have the right Medicare plan for years to come is just as important as celebrating with your family and friends.



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Medicarehealthplans.com is your one-stop resource for all things Medicare. Researching Medicare Advantage plans to find the one that fits your lifestyle? Wondering when you're able to enroll in Medicare Advantage? Want to make sure Medicare Part D covers your specific prescriptions? Medicarehealthplans.com has the information you're looking for, with unbiased experts ready to take your call and answer your questions.

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