

# Medicare Checklist

## 3 MONTHS BEFORE 65TH BIRTHDAY

- Contact Social Security to enroll for Part A and B. If still working with coverage, enroll for Medicare Part A only
- Find a broker to work with
- Assess healthcare needs and create list of doctors and medications that are important to be covered on your plan
- Wait for Medicare card in the mail

## 65TH BIRTHDAY

- Find a broker to work with
- Explore Part D Drug Plans (PDP)
- Compare Advantage Plans (Part C) and Medigap plans
- Assess dental and vision needs
- Discontinue current coverage

## 3 MONTHS AFTER 65TH BIRTHDAY

- Enroll for Part A and B if not already
- Find a broker to work with
- Assess healthcare and dental/ vision needs
- Choose Part C, PDP, or Medigap plan before enrollment closes

## ANNUALLY

- Work with a broker to review your current policy during AEP
- Review healthcare needs
- Plan retirement date if still working

## ANNUAL ENROLLMENT PERIOD (AEP):

October 15th to December 7th

**KATHERINE PHILLIPS**

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Schedule an appointment now at:

[katherinephillipsinsurance.com](http://katherinephillipsinsurance.com)

