

A CLEAR PATH TO MEDICARE

MEDICARE CONVERSATION CHECKLIST

Whether you're approaching age 65, continuing to work, or preparing for retirement, Medicare often comes with important questions. Use this checklist to organize your thoughts before your Medicare conversation.

MY CURRENT SITUATION

- ☐ I am turning 65 within the next 12 months.
- ☐ I am over age 65 and still working.
- ☐ I am over age 65 and planning to retire within the next 12 months.
- ☐ I recently retired.
- ☐ I am already enrolled in Medicare.
- ☐ I am helping a parent, spouse, or family member navigate Medicare.

MY MEDICARE QUESTIONS

- ☐ Do I need to enroll in Medicare if I'm still working?
- ☐ How does my employer coverage work with Medicare?
- ☐ When am I eligible to enroll, and what enrollment periods apply to me?
- ☐ What is the difference between Medicare Advantage and Medicare Supplement?
- ☐ Do I need a Prescription Drug Plan?
- ☐ How often should I review my Medicare coverage?
- ☐ I have other Medicare questions.

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MY CONVERSATION PRIORITIES

- ☐ Medicare eligibility and enrollment.
- ☐ Employer coverage and retirement planning.
- ☐ Medicare coverage options.
- ☐ Prescription drug coverage.
- ☐ Annual Medicare reviews.
- ☐ Finding reliable Medicare resources.

BEFORE MY MEDICARE CONVERSATION

- ☐ I know approximately when I plan to retire (if applicable).
- ☐ I know my Adjusted Gross Income (AGI) for the past two years.
- ☐ I have information about my current health insurance coverage.
- ☐ I have an up-to-date list of my prescription medications, doctors, and pharmacies.
- ☐ I know whether I participate in a Health Savings Account (HSA).
- ☐ I understand that my healthcare needs and retirement plans may influence my Medicare decisions.

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NOTES & QUESTIONS

YOUR CLEAR PATH FORWARD

Every Medicare journey is unique, and your questions matter. This checklist is designed to help you organize your thoughts, identify discussion topics, and prepare for a productive Medicare conversation.

Bring this completed checklist with you to your appointment as a helpful starting point for your discussion.

This checklist is intended for educational purposes only and is not a recommendation for any specific Medicare plan, carrier, or coverage option.

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