Medicare Turning 65 Checklist

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Documents to Gather

- [ ] Social Security card
- [ ] Birth certificate
- [ ] Current insurance cards
- [ ] List of current medications
- [ ] List of preferred doctors
- [ ] Recent medical records

Questions to Consider

- Do you want to keep your current doctors?
- How often do you travel?
- What’s your preferred pharmacy?
- Do you take regular medications?
- What’s your budget for healthcare?
- Do you want dental or vision coverage?
- Would extra protection for hospital stays give you peace of mind?
- Could a lump-sum benefit help cover costs like deductibles, copays, or lost income during a hospital stay?
- Do you want coverage that helps with unexpected expenses not paid by Medicare?

Important Dates

- **3 months before 65th birthday**: Initial Enrollment begins
- **65th birthday month**: Medicare coverage starts
- **3 months after 65th birthday**: Initial Enrollment ends
- **October 15 – December 7**: Annual Enrollment Period

Why Consider Hospital Indemnity Coverage?

Hospital indemnity plans can provide cash benefits directly to you when hospitalized. These funds can help cover:

- Medicare deductibles and copays
- Transportation, lodging, or meals for family members
- Everyday expenses like bills or groceries during recovery
- Extra peace of mind for unexpected medical events

Next Step

Call today to schedule a **FREE consultation** — no cost, no obligation.

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