

TURNING 65 or New To Part B? Leap Into Medicare Checklist

A Guide With The Focus On YOU



READY FOR MEDICARE ACTION PLAN

Medicare can be complex; this checklist will help smooth the way as you prepare for enrollment

QUESTIONS? Contact SIOBHAN FARR +1 214.838.1986 | Hello@PositiveImpact4U.com

TURNING 65? WATCH VIDEO 'Five Critical Medicare Mistakes To Avoid'

6 MONTHS Before Turning 65 • Start Learning the A, B, C, & Ds of Medicare and the plan options. It's best not to wait until your 7-month Initial Enrollment Period (IEP) which starts 3 months before your 65th birthday month. Medicare covers and the costs. Start by

Set a reminder 3 months before your Initial Enrollment Period. This will help you

Planning to continue working after to learn how your company's health plan

4 MONTHS Before Turning 65 • and calculate costs for premiums, deductibles

IMPORTANT CONSIDERATIONS:

- Will you need to use a network or health plan?
- Does the plan require referrals to visit specialists?
- Are your drugs on the plan's medication list?
- Will the plan cover your medical needs?
- Does the plan have a good quality rating?

3 MONTHS Before Turning 65 • 1 Enrollment Period (IEP). This will ensure benefit date; the first day of your 65th birthday

As soon as you receive your Medicare agent to complete your enrollment in the plan(s) of your choice; 1 (MediGap) and Part D Plan (Rx drugs) or Medicare Advantage (P)

3 MONTHS AFTER Medicare Enrollment • During the first with your doctors for a 'Welcome to Medicare' visit. This is especially important for those with chronic conditions. A preventative initial meeting when you are in medical distress. If you don't 'click' with your doctor, you can request a change of primary care physician.

If you have any concerns or questions, contact your personal calling the plan's Customer Service line, unless it is an emergency, enrolling with a person who now knows you; as compared to a call center representative.

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Positive Impact for You T65 OPTIONS EVALUATOR

CONSIDER NETWORKS FIRST: Medicare Advantage/Part C plans are HMOs or PPOs. If it is important to you for a specific doctor or service to be in the plan's network; that can be an easy eliminator. Use NOTES for features important to you.

LIST HEALTHCARE PLAN LIKES and DISLIKES

WHAT I LIKE		WHAT I DISLIKE	
1		1	
2		2	
3		3	

IMPORTANT PLAN CONSIDERATIONS	PLAN OPTION 1	PLAN OPTION 2	PLAN OPTION 3	PLAN OPTION 4	NOTES
Check Network for Dr.					
Check Network for Dr.					
Check Network for Dr.					
Check Network for Dr.					
Physician Referral Required?					
Check Network for Preferred Pharmacy					
Center for Medicare Services Star Rating					
Personal Consideration					

Positive Impact for You T65 MEDICARE PLAN COMPARE GRID

Review Summary of Benefits: List plan coverages; add a personal *Cost or Benefit* not listed. Use NOTES column for features important to you.

IMPORTANT PLAN COSTS or BENEFITS TO CONSIDER	PLAN OPTION 1	PLAN OPTION 2	PLAN OPTION 3	PLAN OPTION 4	NOTES
COST Monthly Plan Premium					
COST Primary Care Physician Co-Pay					
COST Specialist Physician Co-Pay					
COST Hospital & Skilled Nursing Co-Pay					
COST Maximum Annual Out of Pocket (MOOP)					
COST Rx Deductible (Non-Applicable Tier)					
COST Rx Co-Pay for YOUR Prescriptions					
BENEFIT \$ Dental (Ambulance or Allowance)					
BENEFIT \$ vision (Ambulance or Allowance)					
BENEFIT \$ Hearing (Ambulance or Allowance)					
BENEFIT \$ Allowance Over Counter Products					
BENEFIT Transportation Non-Emergency Rides					
* COST or BENEFIT *					

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Here's Your T65 ACTION PLAN KIT

T65 Checklist

Options Evaluator

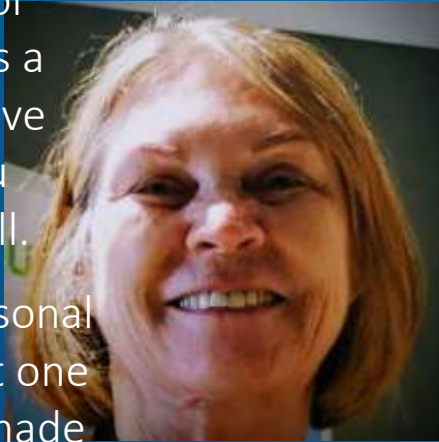
Plan Compare Grid

Don't Want To Deal With Sorting All This? Scroll To The Next Page!

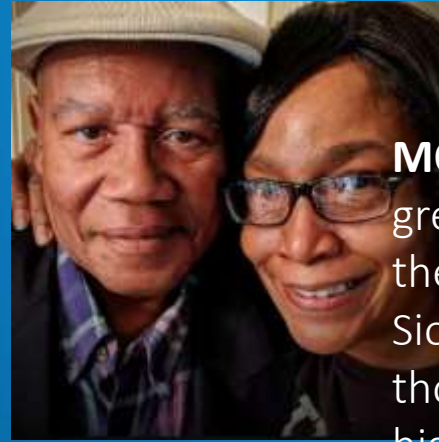
I have the resources to save you time & money by preparing a Personal Plan Comparison FOR you



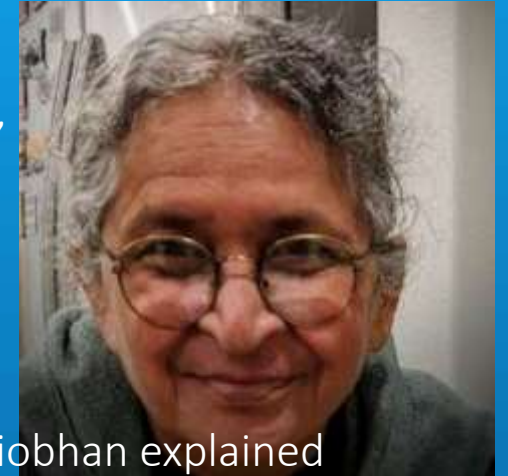
RHONDA F-M • Siobhan, you were so helpful walking my way through Medicare, answering all my questions plus making suggestions for my best options. Mine was a difficult case that could have been a mess, however you were with me through it all.



I love that you are MY personal agent, not working for just one insurance company! You made sure I had the best policy for me. What a difference you made! I look forward to you helping my husband turning 65 (yes, my younger husband :-)



MORRIS & JANICE H • She is a great agent who cares about the needs of her clients. Siobhan is very easy to talk to, thoughtful, and pleasant. I highly recommend to others the professional quality of service she provides.



USHA S • Siobhan explained to us about Medicare and all the plans pros & cons. She helped us pick the right plan for my mom. She texts or calls to check on her clients; alerts them of scams and health issues. I'm so glad we consulted Siobhan instead of signing up with a call center.

DANNY W • She took her time and didn't rush through. I really enjoyed working with her; I will refer Siobhan to anyone looking for Medicare information.



- **CONTACT ME** :: I'm looking forward to being your Medicare Agent Advisor.
- I have the resources to **save you time & money** by preparing a **Personal Plan Comparison** for you.
- I enjoy bringing CLARITY to navigating Medicare.
- After enrollment, I maintain our relationship to assist you going forward.
- **Ready to Get Started Now? Explore Medicare Plans** with these 24|7 resources.

I am a **Licensed Independent Insurance Agent Broker** certified to specialize in **Medicare**. With 15+ years experience in health insurance, I can guide you through the multitude of Medicare benefit options.



Siobhan Farr

(shah-VAWN far)

Licensed Insurance Agent
Certified Medicare

Major National Medicare Insurance Carriers Represented

CALL | TEXT 214.838.1986 • SCHEDULE a NO. FEE. EVER. CONSULT