



Turning 65 Guide Map

Your Path to Navigating
Your Start with Medicare

866.816.9678

12-16
MONTHS
BEFORE 65

Meet with us for a Medicare 101 Workshop

- Learn the basics of Medicare: Part A, Part B, Part D, and Medicare Advantage (Part C).
- Understand important deadlines and how to avoid lifetime penalties.
- Recognize common scams targeting new Medicare beneficiaries.
- Ask questions and start planning with our team.

3
MONTHS
BEFORE 65

Apply for Medicare Part A & Part B

- We'll guide you through the application process.
- Enrolling on time helps you avoid gaps in coverage and late enrollment penalties.
- We are committed to walking with you through each step to make the entire process stress-free.

1-3
MONTHS
BEFORE 65

Evaluate & Enroll in a Medicare Plan

- As licensed agents, we will help you compare plan options for:
 - Medicare Supplement (Medigap)
 - Medicare Advantage (Part C)
 - Prescription Drug Coverage (Part D)
- Together, we'll find the plan that best fits your health, lifestyle, and budget.

AFTER
TURNING
65

Build a Life-long Relationship

- We provide annual check-ins to review your plan, prescriptions, and coverage.
- In addition we provide important updates on Medicare changes and new plan options.
- Enjoy a trusted agent relationship for life - not just at the point of enrollment.
- We provide year-round support whenever you need help.