



Turning 65 Checklist

The Medicare Dude™ Resource Library



Your step-by-step checklist for enrolling in Medicare without missing important deadlines.

6 Months Before 65

- Verify your Medicare eligibility.
- Review employer coverage if still working.
- Create a Medicare folder for documents.
- Estimate your retirement healthcare budget.

3 Months Before 65

- Apply for Medicare Parts A and B if needed.
- Request Medicare Supplement quotes.
- Compare Part D plans.
- Make a list of physicians and prescriptions.

Birthday Month

- Confirm Medicare effective dates.
- Enroll in your selected supplement and drug plan.
- Verify ID cards have arrived.

After Enrollment

- Schedule your Annual Wellness Visit.
- Store plan documents safely.
- Review coverage each fall during Annual Enrollment.

Important Documents

- Medicare card
- Social Security information
- Prescription list
- Doctor list
- Current insurance cards
- Banking information if paying premiums automatically

Questions for Your Medicare Broker

- Which supplement fits my budget?
- Do I need Part D?
- Are my doctors covered?
- What enrollment deadlines apply to me?

Need Help Turning 65?

William Gray

The Medicare Dude™

Serving Medicare Beneficiaries Since 1998

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