

Conference on Aging

Things to Consider as You Prepare to Transition to Medicare Benefits

Prepared by Bonnie Dyar, Financial Representative
Bill C Brown Associates bdyar@billcbrown.com 812-332-9378

- 1. Do you currently have health insurance?**
 - Where- Employer group or individual plan?
 - Bring a summary of plan benefits and your cost of the premium
 - If it's an employer group plan- does the Employer have more than 20 full time employees (confirm with HR)?
 - Are you participating in an HSA?
- 2. Why are you moving to Medicare?**
 - Turning 65?
 - Retiring and leaving employer benefits?
 - Moving to part time? Self-employed?
- 3. Do you have dependents on your current plan?**
- 4. Bring a list of your current prescription medications:**
 - The exact name of RX that is on the bottle
 - Dosage
 - Frequency that you take it
- 5. Bring your driver's license, current insurance ID card, and your Medicare card (if you have already received it)**
- 6. Do you currently have a Long-Term Care plan in place that provides for an extended care at home, an assisted living community or a nursing facility?**

Presenting Partner:



Supporting Partners:



Contributing Partners:

