

MEDICARE ENROLLMENT

4 Steps to Understanding IEP



Step 1

Advisor Review & Research

We work with many of the top insurance companies which allows us to shop around for the plan that protects your best interest.

We will help you determine which of the available plan types and options best fit your needs based on things like:

- Your doctors
- Your prescription drugs
- Your hospital preferences
- Additional needs and benefits

We will go through a detailed inspection and review of your health coverage situation.

May 15th

Recommended to complete 3 months before effective date

Step 2

Sign up for Medicare Part A & B

It is important not to delay enrollment into Medicare Part A & B when you become eligible.

You can sign up online at www.ssa.gov/medicare

1. Scroll down the page and find the blue button and click "Apply for Medicare"
2. Complete Medicare application and print confirmation page
3. Follow up regularly to ensure proper processing without delays

June 1st

Complete as close to the first month of enrollment as possible

Step 3

Plan Enrollment Paperwork Submission

We will review the best plan option(s) available and complete necessary research and enrollment paperwork.

We can enroll you in your personalized plan and help to submit any necessary paperwork.

June - July

Complete during the first 2 months of enrollment

Step 4

Personal Policy Review

After you have received your policy packet and ID cards for your new coverage(s).

We will review together how to best utilize and access your benefits and coverage, we will continue to be your person to contact with any questions or concerns that you may have.

September

Complete the month of effective date