

High-Impact Financial Wellness!

The 7 Social Security and Medicare Basics



An Essential Checklist for Employees Approaching Retirement!

Social Security & Medicare form the foundation of retirement in America, yet are a source of confusion for most older employees. The Turning 65 Workshop offers an engaging, information-packed 75-minute online learning experience that helps older employees better understand these programs and the important filing decisions they will soon be facing.

This unique virtual presentation covers 7 key Social Security & Medicare topics in a practical, easy-to-understand 'Checklist' format...

- **Filing Age Considerations... Early or Delayed?**
- **Beware! Social Security's Annual Earnings Test**
- **Benefits for Spouses, Survivors... and ex-Spouses**
 - **The Medicare Choice: Original or Advantage**
 - **Working at 65? When Group Meets Medicare!**
 - **Navigating the Enrollment Process**
 - **Using a mySocialSecurity Online Account**
- Includes HR Training video, *Understanding the Group-to-Medicare Transition Process*

"I still get kudos for finding the Turning 65 Workshop for our employees!"

Becky Withstandley, SVP Total Rewards Manager, Seacoast Bank. Stuart, FL



Presented by Thomas Wright, a former long-time financial advisor and creator of the Turning 65 Workshop. Tom has spoken to audiences across the United States on topics related to Social Security & Medicare. He's well known for communicating complex financial information understandably.

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High-Impact Financial Wellness for Older Employees

Enhance understanding of these foundational retirement benefits with our unique, comprehensive learning package... for employees and HR team members alike!

CONVENIENCE. All Turning 65 Workshops now come with 60-days of viewing access. Employees, and their significant others, can review all or some of the program as needed.

GUIDEBOOK. Employees get a valuable 20-page guidebook to supplement the workshop. Includes self-help tools like direct links to official online information and common questions.

HR SUPPORT. Team members get early access to a preview video of the presentation, a Group-to-Medicare training video, and a Catalog of common employee questions.

AFFORDABLE. The online delivery format makes the presentation very budget-friendly!

Two Options...

- **LIVE WEBINAR**

Specific to your organization. Concludes with interactive Q & A.

- **ON-DEMAND VIDEO**

Pre-recorded presentation. Maximum Flexibility. Lowest Cost.

“Great program! Employees very engaged and thankful. Highly recommended!”