

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*
Interactive HR Team Training custom programs also available for large organizations

"Consistently positive feedback. Well over 1,000 of our employees have benefited"

Susan Pelletier, SPHR. VP Benefits & HR Operations, MaineHealth, Portland, ME



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.

turning65workshop.com | 207.846.6138 | info@turning65workshop.com

The 7 Social Security and Medicare Basics

An Essential Checklist for Employees Approaching Retirement!



High-Impact Financial Wellness for Older Employees

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

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

TOOLBOX. Employees receive a supplemental 20-page handbook ('Toolbox'). 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.

ENGAGEMENT. We supply materials to help generate employee interest and engagement! For our On-Demand Videos, we also report the analytics that measure actual viewing levels.

Two Options...

- **ON-DEMAND VIDEO**

Pre-recorded presentation. Maximum Flexibility. Lowest Cost

- **LIVE WEBINAR**

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

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