

Client Education Event!

Social Security and Medicare

Understanding the Key Filing Decisions Ahead...



Social Security & Medicare form the foundation of retirement, yet are often not well understood. Destination 65 is an engaging, info-packed 90-minute learning experience designed to help clients approaching retirement better understand these essential programs.

Created by a former financial advisor, this unique and engaging presentation can be delivered in-person or live-streamed. It covers 7 key issues 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**

"Provided valuable information for our pre-retirement clients- and our staff- in key areas. A great investment in our practice!"



Destination 65 is 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](tel:207.846.6138) | info@turning65workshop.com