

The Social Security and Medicare POWER HOUR



7 'Need-to-Know' Retirement Planning Basics

Social Security & Medicare are the foundation of retirement, yet are often not well understood. The Turning 65 Workshop offers a unique, independent, professionally-presented learning experience designed to help employees nearing retirement build a confident understanding of the essentials... and the important filing decisions ahead.

This engaging, fast-paced online program covers 7 key Social Security & Medicare topics in a way that's practical, relevant, and easy for employees to understand.

- **Filing Age Considerations... Early or Delayed?**
- **Beware! Social Security's Annual Earnings Test**
- **Benefits for Spouses, Survivors, and ex-Spouses**
- **Using a *mySocialSecurity* Online Account**
- **The Medicare Choice: *Original or Advantage***
 - **Navigating the Enrollment Maze**
 - **When the Group Plan Meets Medicare!**
- HR Benefits training segment, *Group-to-Medicare Hot Spots!*

"We had been looking for a program like this for years, and finally found it!"



Presented by Thomas Wright, a former long-time financial advisor and creator of the Turning 65 Workshop. Tom has spoken across the country on Social Security & Medicare topics and is well known for communicating complex financial info understandably.

turning65workshop.com

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CONVENIENCE. Each presentation comes with 2-months of unlimited viewing access. Employees, and their significant others, can review some or all of the program as needed.

AFFORDABLE. Low-cost rates (based on organization size) that don't strain budgets. *Webinar:* Cost-effective, company-wide event. *Video:* Lower cost, simplicity, and flexibility.

HR RESOURCES. Ready-made communication templates to help announce & promote the program, plus a supplemental *Group-to-Medicare Hot Spots!* HR Benefits training video.

ENGAGEMENT. *Webinar:* Popular interactive Q & A session with the presenter. *Video:* Optional employee viewing data, plus weekly trivia templates to help sustain interest.



"Impressive program! In all our research we couldn't find anything else like it."



Thomas Wright and the Turning 65 Workshop

Tom began his career in 1980 with John Hancock Financial Services. From 1984 to 2016 he was a financial advisor, specializing in employee benefits. He then created the Turning 65 Workshop (turning65workshop.com) to provide much-needed Social Security & Medicare learning programs for employees approaching retirement, as well as training for HR professionals.

He attended the University of New Hampshire and has earned the Chartered Life Underwriter (CLU) designation from the American College of Financial Services.

He's been quoted on various employee benefit topics by media outlets including *Kiplinger's* and *Fortune* magazines, *The Boston Globe*. He's also been a featured guest on a number of television and radio programs, and more recently podcasts.

Tom has presented both in-person and virtually to audiences across the United States. He draws upon decades of first-hand experience to communicate dry, complex financial material in an engaging and simple way that ordinary people understand.

Over his career, he has been involved in numerous trade associations, including the National Association of Insurance & Financial Advisors, the New England Employee Benefits Council, the Employers Association of the Northeast, his local Chamber of Commerce, and the Society for Human Resource Management.

It was great to finally be able to offer our employees a clear, concise Social Security & Medicare presentation. We had been looking for a program like this for years, and finally found it! I highly recommend both the employee program and the HR training.

Vesna Paulsen, Senior Benefits Manager, Marks Paneth LLP, New York City

The Turning 65 Workshop has facilitated Social Security & Medicare learning programs for well over 2,500 of our employees, both in person and now virtually. They have benefited from its practical approach to navigating these complex subjects.

Sue Pelletier, VP HR Shared Services, MaineHealth, Portland, ME

I continue to get kudos for bringing the Turning 65 Workshop to Seacoast- even those who didn't participate told me they heard how great it was! And our HR benefits team found the 'Group-to-Medicare' training to be most valuable!

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

The Turning 65 Workshop is great value for employers, and a wonderful way to bring this important info to your employees. It is knowledgeable, engaging, and extremely helpful. And no sales pitch! Feedback was THANK YOU, THANK YOU, THANK YOU!!!!

Wally Harper, SVP Human Resources, Gaylord Specialty Healthcare, Wallingford, CT