

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 90-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*

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

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



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.