

Help465 Medicare Checklist

Turning 65: Medicare Preparation Checklist

Estimated Time: 15–20 Minutes

Purpose:

Use this checklist to prepare for Medicare before your 65th birthday. Completing these steps ahead of time can help you feel more organized, ask better questions, and make more confident Medicare decisions.

Step 1 - Learn the Basics

Before comparing plans, make sure you understand the Medicare foundation.

- ☐ I understand what Medicare is.
 - ☐ I understand the four parts of Medicare (A, B, C, and D).
 - ☐ I understand the difference between Original Medicare and Medicare Advantage.
 - ☐ I understand what a Medicare Supplement plan is.
 - ☐ I've completed Lesson 1 of the Help465 Medicare Academy.
-

Step 2 - Know Your Timeline

Medicare enrollment depends on your individual situation.

- ☐ I know when I turn 65.

Birthday:

- ☐ I know when my Initial Enrollment Period begins.
- ☐ I know when my Initial Enrollment Period ends.

☐ I understand whether I may qualify for another enrollment period if I'm still working.

Help465 Heads-Up

Don't wait until the last minute.

Learning early gives you time to understand your options before important enrollment deadlines arrive.

Step 3 - My Healthcare Providers

Write down the healthcare providers that are important to you.

Primary Care Physician

Specialists

Preferred Hospital

Questions about my providers

Step 4 - My Prescription Medications

List every prescription medication you currently take.

Medication

Dosage

How Often?

Preferred Pharmacy

Need additional space?

Attach another page if necessary.

Step 5 - My Healthcare Priorities

Which of the following are most important to you?

- ☐ Keeping my current doctors.
 - ☐ Predictable healthcare costs.
 - ☐ Lower monthly premiums.
 - ☐ Prescription drug coverage.
 - ☐ Dental benefits.
 - ☐ Vision benefits.
 - ☐ Hearing benefits.
 - ☐ Nationwide provider flexibility.
 - ☐ Traveling frequently.
 - ☐ Other
-
-

Medicare Minute

No two people have the same Medicare priorities.

Understanding what's important to **you** makes comparing plans much easier.

Step 6 - My Questions

Write down every Medicare question you have.

Remember...

No question is too small.

Step 7 - Before I Enroll

Before making a Medicare decision, I have:

- ☐ Compared my Medicare options.
 - ☐ Reviewed my doctors.
 - ☐ Reviewed my medications.
 - ☐ Compared my expected healthcare costs.
 - ☐ Asked questions I didn't understand.
 - ☐ Reviewed my enrollment timeline.
 - ☐ Feel confident about my decision.
-

My Medicare Snapshot

Name

65th Birthday

Currently Working?

☐ Yes

☐ No

Current Health Insurance

Expected Retirement Date

Current Primary Care Physician

Current Pharmacy

Final Thoughts

Congratulations!

If you've completed this checklist, you've already done something many people never do...you've taken time to prepare before making important Medicare decisions.

That's exactly what this checklist was designed to help you accomplish.

Remember:

Education comes before enrollment.

Preparation builds confidence.

Confidence leads to better decisions.

Need Help?

If you'd like personalized guidance based on your doctors, medications, healthcare priorities, and Medicare timeline, Help465 is here to help.

No pressure.

No confusing jargon.

Just honest guidance, trusted advice, and genuine care.