

Help465 Medicare Planning Worksheet

Preparing for Your Medicare Appointment

Estimated Time: 10–15 Minutes

Purpose:

A productive Medicare appointment begins before you ever sit down with an agent. Use this worksheet to organize your information, identify your priorities, and prepare thoughtful questions so you can make informed decisions with confidence.

Step 1 — My Appointment Information

Appointment Date

Appointment Time

Meeting Location / Phone / Video

Advisor or Agency

Step 2 — My Current Coverage

Current Health Insurance

Current Prescription Drug Coverage

Currently Receiving Social Security?

☐ Yes

☐ No

Currently Working?

☐ Yes

☐ No

Expected Retirement Date

Help465 Heads-Up

Bringing accurate information to your appointment helps ensure the recommendations you receive are based on your actual situation—not assumptions.

Step 3 — What I Need to Bring

Before leaving for my appointment, I have:

- ☐ My Medicare card (if applicable)
- ☐ My driver's license or photo ID
- ☐ A list of my current medications
- ☐ A list of my doctors and specialists
- ☐ My preferred pharmacy
- ☐ Information about my current health insurance
- ☐ Any Medicare-related letters I've received
- ☐ A notebook or something to take notes

Step 4 — My Healthcare Priorities

What's most important to me?

Check all that apply.

- ☐ Keeping my current doctors
 - ☐ Lower monthly premiums
 - ☐ More predictable healthcare costs
 - ☐ Prescription drug coverage
 - ☐ Dental benefits
 - ☐ Vision benefits
 - ☐ Hearing benefits
 - ☐ Nationwide provider access
 - ☐ Traveling frequently
 - ☐ Other
-
-

Medicare Minute

The best Medicare appointment isn't the one where you hear the most information.

It's the one where you leave understanding your options.

Step 5 — Questions I Want Answered

Write down every question you'd like to ask.

Step 6 — Questions to Consider Asking

If you're not sure where to begin, here are a few helpful questions.

- ☐ Will my doctors participate?
 - ☐ Are my medications covered?
 - ☐ What are my estimated healthcare costs?
 - ☐ What happens if my healthcare needs change?
 - ☐ What happens if I travel?
 - ☐ Does this plan include prescription drug coverage?
 - ☐ What extra benefits are included?
 - ☐ How often should I review my coverage?
-

Step 7 — After My Appointment

After meeting with my Medicare advisor, I understand:

- ☐ My Medicare options
- ☐ My enrollment timeline
- ☐ My estimated healthcare costs
- ☐ My provider options
- ☐ My prescription drug coverage
- ☐ Any next steps I should take

☐ The questions I still need answered

My Notes

Reflection

Take a moment to think about your appointment.

Did you feel listened to?

Did you understand the explanations?

Were your questions answered clearly?

Did you leave feeling more confident than when you arrived?

If not, don't hesitate to continue asking questions until you feel comfortable with your decision.

Final Reminder

A Medicare appointment shouldn't feel rushed.

It shouldn't feel confusing.

And it should never leave you feeling pressured.

The right conversation is one that helps you understand your options and make decisions that fit your own healthcare needs and goals.

That's the standard every Medicare conversation should strive to meet.

Need Help?

Whether you're meeting with Help465 or another Medicare professional, we hope this worksheet helps you prepare for a productive conversation.

Because better preparation leads to better questions.

Better questions lead to better decisions.