

Help465 Medicare Planning Worksheet

Helping Someone You Love with Medicare

Estimated Time: 15–20 Minutes

Purpose:

Helping a parent, spouse, family member, or friend navigate Medicare can feel overwhelming. This worksheet is designed to help you organize important information, prepare meaningful questions, and support someone you care about with confidence and compassion.

A Note Before You Begin

You don't have to know everything about Medicare to be helpful.

Sometimes the greatest gift you can give someone is your time, your patience, and your willingness to learn alongside them.

This worksheet is here to help you do exactly that.

Medicare Minute

Supporting someone through Medicare isn't about making decisions for them.

It's about helping them understand their options so they can make informed decisions with confidence.

Step 1 — About the Person I'm Helping

Name

Relationship to Me

☐ Parent

- ☐ Spouse
- ☐ Grandparent
- ☐ Family Member
- ☐ Friend
- ☐ Other

65th Birthday (if applicable)

Currently Working?

- ☐ Yes
- ☐ No

Current Health Insurance

Step 2 — Their Healthcare Team

Primary Care Physician

Specialists

Preferred Hospital

Preferred Pharmacy

Help465 Heads-Up

If possible, encourage your loved one to be involved in Medicare discussions and decisions. Their healthcare goals, preferences, and priorities should remain at the center of every conversation.

Step 3 — Their Healthcare Priorities

What matters most to them?

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

Step 4 — Questions We Want Answered

Write down the questions you'd like to discuss together.

Real-Life Scenario

Michael helped his father prepare for Medicare.

Instead of trying to make every decision himself, he sat down with his dad and completed a planning worksheet together.

They talked about doctors, medications, healthcare priorities, and the questions they wanted answered before meeting with a Medicare professional.

Their appointment became a conversation...not a rushed decision.

Lesson: Preparing together often leads to greater confidence and better communication.

Step 5 — Supporting the Conversation

Before meeting with a Medicare professional:

- ☐ We've updated the medication list.
 - ☐ We've updated the doctor list.
 - ☐ We've discussed healthcare priorities.
 - ☐ We've written down our questions.
 - ☐ We've reviewed important Medicare dates.
 - ☐ We've gathered important documents.
-

Reflection

Helping someone with Medicare can feel like a big responsibility.

Remember...

You don't have to know every answer.

Listening carefully.

Asking thoughtful questions.

Taking good notes.

Encouraging informed decisions.

Those are some of the most valuable ways you can help.

Final Reminder

Medicare is personal.

Every individual's healthcare needs, financial situation, doctors, medications, and priorities are different.

Helping someone understand their options is often more valuable than trying to make the decision for them.

Keep This Worksheet

Save this worksheet and update it whenever your loved one's healthcare needs, medications, doctors, or circumstances change.

Having organized information available can make future Medicare conversations easier, more productive, and less stressful.

Thank You

Helping someone navigate Medicare is an act of care.

Whether you're supporting a parent, spouse, family member, or friend, your willingness to learn alongside them can make a meaningful difference.

Thank you for taking the time to help someone you love approach Medicare with greater understanding and confidence.

Because every informed decision begins with someone who cares enough to ask questions.