

ARE YOU READY?

YOUR GUIDE TO MEDICARE BENEFITS

CHOOSING THE RIGHT MEDICARE BENEFITS DOESN'T HAVE TO BE CONFUSING. USE THIS CHECKLIST AS A GUIDE TO STAY ON TRACK AND ENSURE YOU DON'T MISS ANY DEADLINES.



Visit us today at [GMBAAdvisorsgroup.com](https://www.GMBAAdvisorsgroup.com) or give us a call at 833-GMBA-INS

MEDICARE CHECKLIST



12 MONTHS PRIOR

Lets connect and discuss the road map
for the next year!
We will discuss what Medicare is, what
to expect when taking action, and what
role the Broker has is during this
transition.

TO DO LIST

☐ Schedule your first free introductory call



6 MONTHS PRIOR

Beware! You will start to receive a lot of
mail and phone calls. It may look and
sound official, but most of it is just
marketing. We can help drown out the
noise.

TO DO LIST

- ☐ Schedule a 30 min call for a needs
analysis/review
- ☐ Review your Medicare and you Booklet
- ☐ Create a list of questions, if you have any
- ☐ Create a list of medications and doctors



4 MONTHS PRIOR

Mailers, Emails and calls will increase
around this time, don't worry you can
ignore most of it. Pay close attention to
letters / documents from CMS, Medicare
and SSA. If you are unsure which is
official, call us!
The first deadline to take action is 1
month away (enrolling in Medicare Part
B)

TO DO LIST

- ☐ Confirm that your doctor accepts original
Medicare
- ☐ Schedule an appointment to review and
approve plans
- ☐ Gather documents to enroll in
Medicare Part B



3 MONTHS PRIOR

The first enrollment deadline is this NOW, Medicare Part B. Enroll on time to avoid any potential penalties.

Cards will come in the mail and it can take 4-6 weeks to receive them.

Determine if your income qualifies you for extra help or if will you receive an income related adjustment if it is too high.

TO DO LIST

☐

If you have both Medicare Part A and Part B, time to set enrollment meeting with GMBA Advisors

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Enroll in Medicare Part B if you are not taking Social Security Benefits
<https://www.ssa.gov/benefits/medicare/>



2 MONTHS PRIOR

Have you enrolled in Medicare Part B?

Have you received your cards?

It is important to enroll in coverage early so that you have your cards in hand and there is no lapse in coverage or the ability to enroll in extra coverage.

TO DO LIST

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Time to enroll in additional coverage and terminate your current coverage

☐

Set up last meeting with GMBA Advisors Group before your 65th birthday!

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Pay Medicare Part B premiums



HAPPY 65TH BIRTHDAY!



You will typically receive a Medicare Advantage or Prescription Drug plan verification call from the carrier no later than 10 days after you enroll.

Be prepared for lots of plan documents to arrive after your enrolled.

There are multiple mailings that must be sent as part of compliance. Not sure what they are when you receive them? Call us.

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Do you have your enrollment checklist for the Medicare Advantage or the PDP Rx Plan call?

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Review all correspondence from the insurance carrier you have enrolled in.

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Review all Carrier, CMS and SSA regulatory mailings

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Schedule your welcome to Medicare Physical



GARRY MANCHULENKO

Garry believes health insurance coverage is only a good value if it meets your needs and makes sense. He began selling insurance 15 years ago and went from representing a single health insurance company to brokering with several he feels are the most reputable in the industry in order to provide a variety of options. He has walked 100's of Medicare beneficiaries like you through this transition to obtain the right coverage. Multiple referral partners have trusted him with their clients. Having experienced a health scare himself and helped multiple clients through the same. He understands that the right coverage is critical. Having worked with carriers, he knows who has been there for his clients and sadly who has not. It's stories like Garry's and those of his clients that help him guide people easily and inexpensively through this confusing process.

"We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact Medicare.gov or 1-800-MEDICARE to get information on all of your options."

We're Here to Help You.

REMEMBER

- Review all action items on the checklist for important dates.
- Always pay your Medicare Part B Premiums, if you are not taking Social Security Benefits
- Do not be afraid to use your plan!
- We are here to help!

833-462-2467

www.gmbaadvisorsgroup.com
SCHEDULE YOUR FREE CONSULTATION
TODAY!

<https://calendly.com/gmanchulenko>