



833-799-3509 | TTY: 711 Mon - Fri, 7:30 a.m. - 5 p.m.

Retiring Soon? Here's How to Prepare for Medicare

Congratulations on your well-earned retirement! We want you to feel confident in your health insurance. SmartConnect™ will help you find a Medicare plan that works with your new lifestyle and budget.

Here are some important tips to know before you retire:

Sign up for Medicare.

If you haven't, you'll need to sign up for Medicare. If you are younger than 65, your *Initial Enrollment Period* starts **three months before the month of your 65th birthday**. If you're over 65, you can enroll after you retire as part of a *Special Enrollment Period*. You can start enrollment **three months before your planned retirement date**.

Stop HSA contributions early.

If you postponed Medicare enrollment in order to contribute to your HSA, you'll need to stop those contributions early. Have your employer stop any automatic contributions (either through payroll deduction or from the company) **six months before your planned retirement date** — this will save you a big hassle at tax time!

Gather important documents.

If you postponed enrollment because you were covered by your employer's health plan, you may need your employer to fill out a form proving that you had health insurance. Make sure to gather and complete the proper forms before saying goodbye!

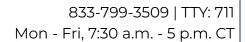
Understand Medicare costs.

Medicare premiums change yearly and so do other expenses like deductibles, prescription drug coverage, and Income-Related Monthly Adjustment Amounts (IRMAA). Budget accordingly!

Fill out the following checklist and call us.

Once you have your Medicare card, we will help you navigate the rest. There are countless factors in considering your ideal Medicare policy (travel plans, medical needs, and payment preference to name a few). Don't worry, your SmartConnect licensed agent will guide you through everything in one simple call. We'll discuss your retirement goals with you to determine which options work for your new lifestyle and budget.

SmartMatch Insurance Agency, LLC smartmatch.com/connect/olathepublic







SmartConnect Pre-Enrollment Checklist

Starting Medicare can be overwhelming. But taking a few simple steps will set you up for a stress-free experience. This form will help you gather the information you'll need to enroll in a Medicare plan.

Documents					
Medicare Card Number		Current Insurance Premium			
Annual Deductible		Maximum Out of Pocket			
Checking Account Number		Routing Number			
Personal Information					
Address Line 1					
Address Line 2		City / State / Zip			
Date of Birth	e of Birth		Social Security Number		
Phone Number	Number		Email Address		
Health Care Information					
Provider Name Specialty		/	Address	Phone Number	
Current Prescription Medications					
Medication Name	Dosage	ŀ	Refill Quantity	Refill Frequency	

If you are enrolling in plans for dependents, you will need this same information for each dependent.

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