



# MAGNOLIA HARBOR

— ADVISORS —  
RETIREMENT & MEDICARE PLANNING

## Free Turning 65 Medicare Checklist

A simple guide to help you prepare for Medicare enrollment, compare your options, and move forward with confidence.

1



### Before You Enroll

- Know your Initial Enrollment Period dates
- Decide whether to enroll in Medicare Part A
- Review Medicare Part B premium costs

2



### Compare Your Coverage

- Compare Medicare Supplement and Medicare Advantage options
- Review prescription drug coverage
- Confirm your doctors, specialists, and hospitals are covered

3



### Prepare Your Information

- Gather your prescriptions and provider list
- Review expected healthcare needs for the next 12 months
- Write down questions before making a plan decision

4



### Final Review

- Review dental, vision, and hearing coverage needs
- Understand late enrollment penalties
- Schedule a Medicare consultation before enrolling



### Need help choosing the right Medicare path?

Magnolia Harbor Advisors offers personalized Medicare education and one-on-one guidance.