TEMPLATE B

Turning-65 Worksheet

Item	Date or answer
65th birthday	
Initial Enrollment Period: starts (3 months before birthday month) / ends (3 months after)	
Getting Social Security already? (If yes, Parts A and B usually start automatically)	
Still working, or covered by a working spouse's job plan? Employer size?	
Employer's answer: does the job plan pay first or second after 65?	
Plan for Part B: sign up now, or delay (with proof of job-based coverage)	
Drug coverage: creditable (as good as Medicare's)? Letter on file?	
Date to compare plans	
Date Medigap Open Enrollment starts (first month with Part B and age 65+)	