



New to Medicare Checklist

I have:

Created a [Medicare.gov](https://www.Medicare.gov) and [My Social Security](https://www.MySocialSecurity.gov) accounts.

Signed up for Part B or confirmed that I have it.

Gotten my Red White and Blue Medicare Card.

Securely compiled my physicians and prescription medicines (Forms on [Fortende Health](https://www.FortendeHealth.com) or [Medicare.gov](https://www.Medicare.gov)).

Reviewed the need for CMS forms [CMS-40B](https://www.CMS-40B.com) and [CMS-L564](https://www.CMS-L564.com) if I have continued to be covered by employer coverage after age 65 and am applying for Part B.

Reviewed my potential IRMAA status and completed form [SSA-44](https://www.SSA-44.com) if appropriate.

I understand:

The basic functions of Medicare Parts A (Hospital), Part B (Physician), Part C (Advantage), Part D (Drug) and Medicare Supplements.

The fundamental differences **for me** between the Original Medicare Pathway and the Medicare Advantage Plan Pathway.

The tradeoffs **for me** between:

- 1) costs of care versus premium costs,
- 2) Advantage Plans and Supplements,

I expect that if I speak with a Medicare Broker/Agent:

I will never receive an unsolicited phone call.

All phone calls will be recorded for my protection.

I will agree in writing to discuss plans through a Scope of Appointment form. My broker/agent is paid by the carriers, and I will not directly pay for their service. My broker/agent is a trusted partner and will provide ongoing service.

I am under no obligation, and can permanently break off discussions at any time.

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 your options.

