

STRATEGIC FINANCIAL GROUP

Medicare Off Work Action Plan

Disclaimer: We are an independent Medicare insurance agency and are not affiliated with or endorsed by the U.S. government, the federal Medicare program, or the Social Security Administration. We do not handle or process applications for Medicare Part A or Part B.

Forms needed:

- **Application for Enrollment in Medicare Part B (Medical Insurance)**
 - Put desired Part B start date in #9 Remarks section (must be the 1st of the month)
- **Request for Employment Information** form filled out and **signed by employer**

Helpful tips:

- If you have a Health Savings Account (HSA), be sure to contact your benefits administrator **6 months** before transitioning from your work plan to Medicare. This will give you enough time to stop any contributions before Medicare coverage starts.
- Apply for Medicare Part B at least **60 days** before you want coverage to begin.
- Be sure to complete **BOTH** forms to apply for Part B whether you do so online or in person.
- Make a copy of your forms and document how/when you submitted the forms.

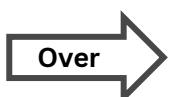
2 ways to Enroll in Medicare:

1. **Online:** You can enroll on the Social Security website (www.ssa.gov/medicare/sign-up) by creating a secure *my Social Security account*. It's an easy way to enroll (if it's not time sensitive). This method may take a bit longer to process than going into a SS office in person.
2. **In Person:** Visit your local Social Security office to complete your enrollment. Many offices require appointments or a mail drop box out in front of the office. This is the quickest way to get approved if it's time sensitive.

Once you've received your Medicare ID, please email/text a picture of it to our office so we can enroll you in your chosen Medicare plan.

Ongoing Care from Strategic Financial Group:

- We will keep you up to date on any Medicare changes throughout the year and plan options each year during the Annual Enrollment Period (October 15 to December 7) to ensure you have the best coverage for your needs.
- We will regularly check in with you throughout the year to ensure your plan is working effectively for you and to address any questions or concerns you may have.
- Feel welcome to call our office anytime you have questions or concerns regarding your Medicare plan. We're here to help!



National Medicare Phone Number:	
1-800-633-4227	
<u>LOCAL MN SOCIAL SECURITY OFFICES</u>	
ALEXANDRIA	1-888-224-8869
AUSTIN	1-866-504-5010
BEMIDJI	1-866-258-6345
BLOOMINGTON	1-866-964-7341
BROOKLYN CENTER	1-866-931-0341
DULUTH	1-855-863-3560
FAIRMONT	1-877-405-0414
FERGUS FALLS	1-877-402-0827
HIBBING	1-866-964-4320
MANKATO	1-877-457-1734
MINNEAPOLIS	1-855-257-0982
ST CLOUD	1-877-405-1446
ST PAUL	1-866-667-7481
WINONA	1-877-600-2853
<u>HELPFUL WEBSITES:</u>	
Social Security Website	www.ssa.gov
Medicare Enrollment	www.ssa.gov/medicare/sign-up
SS office locator	www.ssa.gov/locator
Avoiding SS scams	www.ssa.gov/scams