

Congratulations! Your initial consultation appointment has been scheduled, now what?

There could be any amount of reasons that you have set your appointment to talk to your dedicated advisor at Transitions RBG. We want to help you be prepared for your call. This call will last between 15-30 minutes depending on the depth of your conversation and if you are discussing yourself or yourself and your spouse. You could be discussing how to assist a family member, those calls will also last 15-30 minutes. There may be a need for a follow up conversation based on what you are looking to accomplish on this call.

Let's talk about the scope of this first conversation. Our goal in this conversation is to answer questions you may have as well as help you develop a plan for your medical benefits. You may be considering retirement, continuing to work, or simply trying to see if Medicare is a better option to your employers health plan. Since there is a broad range of options we wanted to help you prepare for your call with our team. Below you will find a few things that we recommend having prior to the call depending on the outcome you are looking for. Please know, you do NOT have to have all of this information. These are just a recommendation.

Preparing for your Medicare Consultation

A few questions we will ask to help understand enrollment options and planning.

- Are you turning 65? or Eligible for Medicare for the first time?
- Are you already eligible for Medicare, worked past age 65?
- Are you planning on working past Medicare Eligibility?
- Are you on a HDHP & contributing to an HSA?
- Do you have a spouse or dependents on your group plan?
- Do you have a timeline or date that you want to leave your group plan?
- Do you have a plan that we need to help you accomplish?

Things to know or have with you



Rough estimate of how much medical support you utilize and/or out of pocket costs you spend each year. (Spouse as well)



Do you know what employer plan you are enrolled into and how much your costs, copay's, and deductibles are? (Spouse as well)
Please have that with you.



Are there specific doctors or pharmacies that you want to remain in network with? If so, please have those with you as well.



Do you have maintenance medications that you take daily or have a medical condition that requires ongoing care? Please have a list of those medications with you. (Spouse as well)

Educational Opportunities to attend prior to our consultation

Understanding & Preparing for Medicare Eligibility

Join us to learn about Medicare basics, enrollment opportunities, and types of coverage options.

Every Wednesday @ 11am EST



[Register Here](#)

Caregiver & Family Support

Join us to learn about the resources we provide at Transitions RBG, for you and your loved ones.

Every Wednesday @ 1pm EST



[Register Here](#)



If you have further questions prior to your appointment, please email us at info@transitionsrbg.com.

If you need to cancel or reschedule your appointment, please utilize the confirmation email that was sent to you. If you do not have access to that email, please call us at 800-936-1405.

We look forward to speaking with you soon.