2026 · ENROLLING IN MEDICARE

GRIMES AND COMPANY

Enrolling in Medicare can feel overwhelming, but gathering a few key details ahead of time can help make the process smoother and more manageable.

PREPARE YOUR INFORMATION

- ☐ **Gather important documents,** including your Social Security number and identification (e.g., birth certificate), before beginning your enrollment.

REVIEW YOUR ENROLLMENT DETAILS

- ☐ **Confirm your Medicare coverage start date** and enrollment decisions as discussed with your advisor or insurance professional.

COMPLETE YOUR ENROLLMENT FOR PARTS A AND B

- ☐ **Create or log into your "my Social Security" account at SSA.gov** to enroll in Medicare Parts A and B.
- ☐ **Begin your application through SSA.gov** or schedule a phone or in-person appointment, if needed.
- ☐ **Review your enrollment** before submitting it to ensure it is accurate.
- ☐ **Notify your financial advisor** or insurance professional once your coverage begins so they can help coordinate your overall financial plan.

CONFIRM YOUR ENROLLMENT

- ☐ **Obtain your Medicare number and coverage effective dates** by downloading your Benefit Verification Letter from SSA.gov once it becomes available or waiting for your Medicare card to arrive in the mail.
- ☐ **Create or log into your Medicare account at Medicare.gov** using your Medicare number to review your coverage details and manage your account online.
- ☐ **Review how your Medicare premiums will be paid** (e.g., deducted from Social Security, quarterly Medicare bill, Medicare Easy Pay, etc.) and complete any required payment setup.

COMPLETE YOUR ENROLLMENT FOR PARTS C, D, AND MEDIGAP

- ☐ **If applicable, enroll in the Medicare Advantage (Part C), prescription drug (Part D), or Medigap plan** recommended by your advisor through Medicare.gov or your selected insurance provider.

KEEP RECORDS AND MONITOR

- ☐ **Keep copies of your enrollment confirmations,** plan selections, premium notices, and Medicare correspondence.
- ☐ **Monitor your mail and online accounts** for updates or requests for additional information.
- ☐ **Be cautious of common scams** involving unsolicited phone calls, emails, or text messages claiming to be from Medicare.

Enrollment in Medicare Parts A and B will occur automatically if you've already filed for Social Security benefits.

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