



MEDICARE
LONG TERM CARE

Client Tool Kit

VIP Medicare Program

“Your Roadmap to Medicare”



At HTA we feel it is important that our clients receive proper assistance and advice when it comes to their Medicare decisions. We provide a full service package to help you transition to Medicare, acquire appropriate coverage to meet your needs and provide ongoing support

Pre-retirement “Roadmap to Medicare” Consultation

Individual, no cost phone counseling session to prepare and answer questions for all aspects of retirement healthcare

We review:



A short fact finder to collect details on the individual’s specific situation as it pertains to planned age for retirement, size of employer group health program and out of pocket medical expenses



Personalized information on Medicare related topics

- Transition from Group Health to Original Medicare and Medicare Supplement Insurance
- Helpful timeline as to when to contact Social Security and under what circumstances to enroll or defer Medicare Part B
- What Medicare, Medicare Supplement Insurance, Prescription Drug Plans and Medicare Advantage Plans cover

Tailor-made “Roadmap to Medicare” Report

Specialized report that will give step by step action items to do at specific times leading up to retirement, which will answer questions like:

- Should I enroll or defer my Medicare Part B at age 65?
- How do I defer/enroll?
- Does it make sense to explore Original Medicare and Medicare Supplement Insurance options if I work past age 65?
- When I am ready to research supplements, who do I contact and how does the process work?



Medicare Supplement Insurance, Prescription Drug Plans and Dental & Vision Coverages

HTA provides gentle guidance and support for choosing appropriate coverage to meet your needs. We will compare costs of 30 leading insurance carriers, explain the products and help complete the enrollment. We follow the applications all the way through issue and make sure the individual is comfortable with the policy once received. We continuously remain available for future questions and to offer assistance. There are **NO SALES PITCHES** -- only friendly, undivided and efficiently executed service. HTA is committed to exceeding your expectations

Please call HTA Client Services Team
To set up your phone consultation

610-430-6650