

Turning 65?

Important Considerations for Your Healthcare Journey



Working Past 65

For employees who continue to work past age 65, the question of whether you should stay on your employer health plan, switch to a Medicare plan, or keep your employer plan and enroll in Medicare is a complicated one. The right answer really depends on your unique situation. Our professionals take the time to help you understand your options so you can be confident you're making the right choice that maximizes your coverage, minimizes costs and helps you avoid costly penalties in the future.



Coordinating Your HSA

Health Savings Accounts (HSAs) allow employees to pay for qualified medical expenses using savings and investment returns in the account that are subject to preferential tax treatment. Once enrolled in Medicare Part A, you and your employer are ineligible to make HSA contributions. Our team can help you navigate this process.



Claiming Social Security

Knowing when its best to claim your Social Security benefit can be challenging. When deciding to draw Social Security, it's recommended that you carefully consider your personal circumstances and financial needs with a licensed professional. Together, we can not only determine when may be a good time for you to claim Social Security, but also how much you could expect to receive and also how continuing to work could impact your benefit.

Learn about us
and how we can
serve you!

SCAN NOW



Schedule an appointment with a licensed
agent today at **800.936.1405**



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