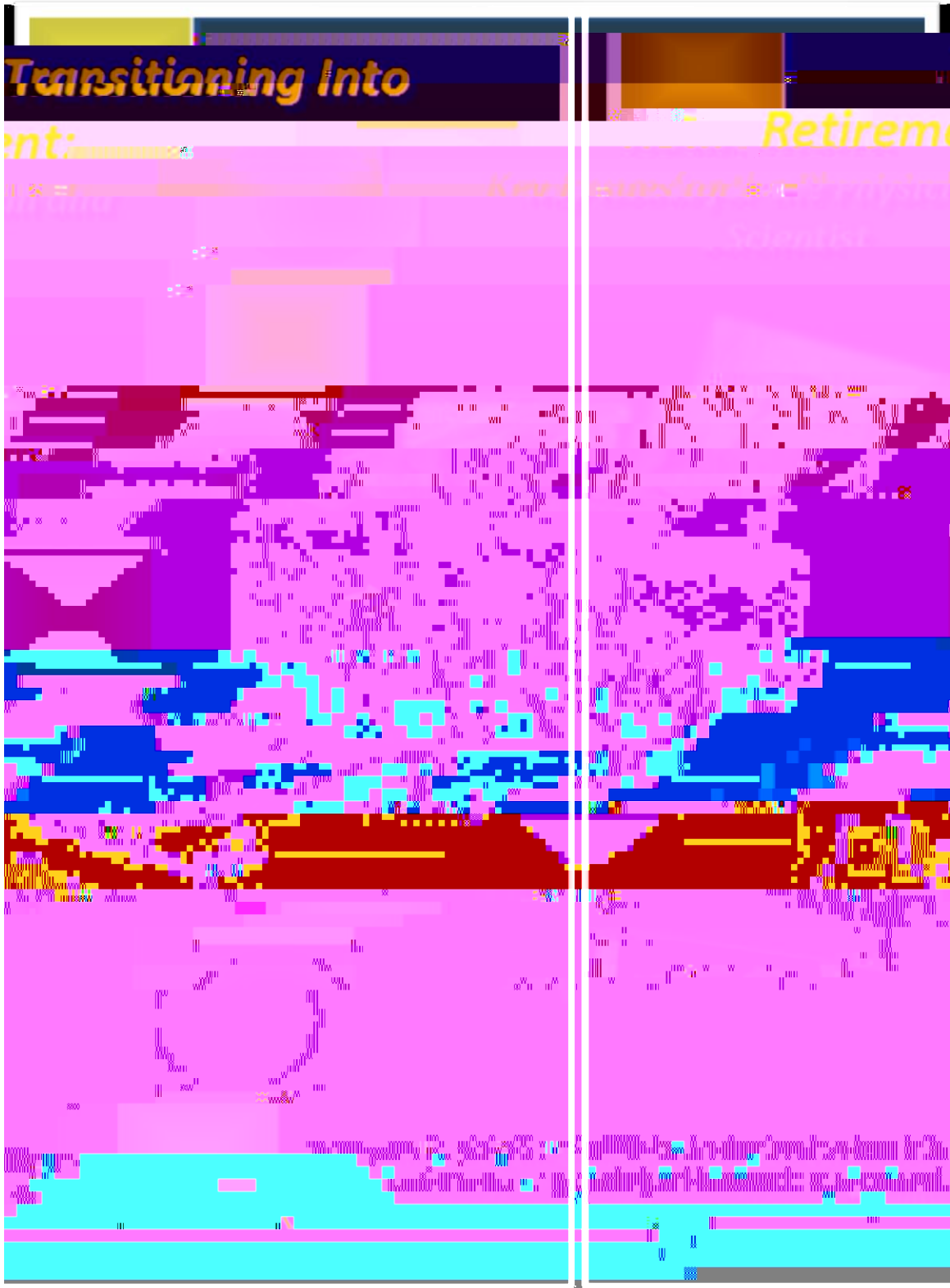


Individual Action Plan Worksheet



The Center for Professional Health
Vanderbilt University Medical Center

Retirement Savings and Budgeting

1. Do you have a prepared financial plan for retirement? Yes No
If yes, describe your financial plans for retirement.

2. What financial company are you currently

Healthcare Coverage : Medicare

1. Who are you currently covering on your health insurance? (Check all that apply)
Self Children
Spouse Other
2. Are you eligible for Medicare? Yes No
3. How familiar are you with the Medicare options Part A, B, and D?
None Some
Little Very
4. How familiar are you with the Medicare Advantage (Part C) options?
None Some
Little Very
5. If you plan to work past age 65-67, Z L O O \ R X N H H S \ R X U H P S O R \ H U \ V L Q V X U D Q F H D V D S
Primary, make sure Medicare knows you have a primary insurance.
Secondary, make sure to sign up for Medicare Part A&B.
6. List at least two things you learned in the session.
7. % D V H G R Q W R G D \ \ V S U H V H Q W D W a n d R o w O u W i l l C h a n g e W o r k R e t i r e m e n t P l a n I n o r d e r
to meet your insurance coverage goals. For more information on health care during retirement, refer to the retirement
guide.



Once at home, set aside one hour to complete the following tasks.

1. If you are within 3 months of 65 years old, sign up for Medicare.
<http://www.socialsecurity.gov/medicareonly/>
2. If eligible, sign up for MyMedicare.gov at <https://www.mymedicare.gov/> - a free online secure service for accessing personalized information on your benefits and services.
3. Print/save the official U.S. Medicare handbook ^{3 0 H G L F D R U X} <https://www.medicare.gov/Pubs/pdf/10050-Medicare-and-You.pdf?>

“Transitioning into Retirement: Key Issues for the Physician and Scientist.”

Faculty and Physician Wellness Committee and the Center for Professional Health - VUMC