Our 4 Step Medicare Process



1 Early Planning

Before Age 65 or Retirement

- Medicare **Timeline Questionnaire** with personalized insights
- **20-minute consultation** with an HTA Advisor
- **Planning tools and videos** for Higher Income, HSA, COBRA and employer coverage decisions

2 Roadmap to Medicare Consultation

Within 8 months of enrollment

- 60 min (individual) / 90 min (couples) **guided Zoom consultation**
- Finalize your **A&B enrollment timeline**
- **Compare insurance plan options** with clear, easy-to-understand visuals
- Personalized **next steps** so you can move forward with confidence

3 Enrollment

After your Roadmap Consultation

- **Step-by-step support** to ensure all parts of Medicare are completed correctly
- **Advisor handled enrollment** in Supplemental or Advantage plan
- **Hands-on guidance** for Part D enrollment through Medicare.gov

4 Ongoing Support

After Enrollment into Medicare Plans

- **Year-round education**, reminders, and Medicare updates
- **Video and Email** updates during the Annual Enrollment Period
- Plan review **consultations for Supplement and Advantage plans**
- **Continued support** navigating Medicare.gov and insurance websites

HTA
insurance services