



# BoomerBenefit

P L A N N I N G

Medicare & Social Security Benefits Simplified

## Formal Speaking / Educational Events

### Medicare Planning

- ✓ State of Healthcare in Retirement
- ✓ Beneficiary Demographics
- ✓ Core Medicare Components
  - Inpatient Care (A)
  - Outpatient Care (B)
  - Medicare Advantage (C)
  - Prescription Drugs (D)
- ✓ The “Donut Hole”
- ✓ Considerations in Choice Structure
- ✓ Medigap/Supplement Plans
- ✓ Integration with Other Care
- ✓ Working Past 65
- ✓ Keys to Reduce Out-of-Pocket Costs
- ✓ Enrollment & Penalty Avoidance
- ✓ Surcharges Related to Income
- ✓ Case Studies

### Social Security Planning

- ✓ Beneficiary Demographics
- ✓ Current Trust Funding Levels
- ✓ Proposed Legislation to Maintain Solvency
- ✓ Core Program Provisions
  - Eligibility
  - Benefit Calculations
  - Spousal Benefits
  - Uncovered Pensions (WEP/GPO)
  - Disability & Survivor Benefits
- ✓ Maximization Opportunities
  - Delayed Retirement Credits
  - File & Suspend / Restricted App.
  - Impact of Bipartisan Budget Act
- ✓ Withdrawal of Application
- ✓ Taxation of Benefits
- ✓ Managing the Filing Process
- ✓ Case Studies

## Client Consultations

- BBP prepares analysis and formal written report for the client.
- Call or meeting scheduled to review report and recommendations.
- Integration with financial advisor and wealth planning efforts.
- Discounted fees for clients of preferred advisor relationships.