

## **CHAPTER 3 - KEY FACTS REVIEW**

### **Q1: What are the six important sectors of retirement?**

- a) Medicare, Social Security, Income, Risk Tolerance, Taxes, Estate Planning.
- b) Waiting, Watching, Thinking, Pausing, Delaying, Considering.
- c) Reading Books, Answering Junk Mail, Asking Neighbors, Responding to TV Commercials, Listening to Robo-Calls, Attending Free Steak Dinner Seminars.

### **Q2: To qualify for Medicare you must:**

- a) Show proof that you need the medical assistance.
- b) Be 65 or older and qualify for Social Security.
- c) Be under a physician's care.

### **Q3: If you are UNDER age 65 you can still qualify for Medicare if:**

- a) You can prove that you are sick.
- b) You are taking care of someone over age 65 that already has Social Security.
- c) You have been receiving Social Security Disability Benefits for at least 24 months.

### **Q4: The one exception to the rules qualifying you for Medicare is:**

- a) If you have ALS (Lou Gehrig's disease.)
- b) Your parents are both still alive.
- c) Your doctor provides a note saying that you need financial assistance for your medical care.

ANSWERS: a, b, c, a.

If you want to discuss your Social Security and Medicare choices, please call us at **1-800-279-1261** and one of our volunteers will be glad to help at no cost to you whatsoever.