SUMMIT
FINANCIAL GROUP

CASE STUDY:
CONFIDENT MEDICARE TRANSITION

A Clear Path into Medicare

Summit provides personalized guidance, education, and hands-on support to help clients make more confident Medicare decisions without delays, penalties, or gaps in coverage.

THE CHALLENGE

For Pamela, navigating Medicare was entirely new territory. This was her first time enrolling, and like many individuals approaching age 65, she faced a complex, high-stakes decision with lasting implications. She wanted confidence that she was making the right choices for her future healthcare coverage.

> Pamela needed assurance that her coverage would begin on time, without penalties or lapses, and that every step would be handled correctly.

The volume of options, unfamiliar terminology, and strict enrollment timelines created uncertainty and stress.

WHAT WE DID

Summit met with Pamela well before her 65th birthday to ensure there was ample time to build a plan aligned with her healthcare needs and enrollment timeline. From the beginning, the team focused on education and clarity.



"They were very informative and answered every question thoroughly. The team put my mind at ease in making the right choices going forward."
Pamela Schultz

Summit reviewed Medicare Supplements, Medicare Advantage Plans, and Prescription Drug Plans, quoting multiple options in each category so Pamela could compare coverage and costs. The team then guided her through the full application, coordinating timelines to prevent delays, penalties, or gaps.

THE RESULT

Pamela experienced a smooth, timely transition into Medicare with no delays, penalties, or lapses in coverage.

Summit enrolled her in a Medicare Supplement Plan paired with a stand-alone prescription drug plan, tailored to her needs and goals. She described the experience as exceptional, noting that Summit was educational, thorough, and went above and beyond.

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