

Quest Commonwealth Expands Medicare and Healthcare Planning Services for Retirees

Quest Commonwealth expands
healthcare services, helping retirees
navigate Medicare and pre-Medicare options for seamless retirement planning.

BINGHAM FARMS, MI, UNITED STATES, December 3, 2024 /EINPresswire.com/ -- Quest



As the newest member of the Quest Commonwealth team, I'm excited to bring my years of expertise in healthcare and Medicare to help retirees navigate this critical part of retirement planning."

Chris Williams, Agent

Commonwealth, a leader in holistic retirement planning, is proud to announce the expansion of its Medicare and healthcare planning services, providing retirees with personalized guidance to navigate the complexities of healthcare costs in retirement.

For many retirees, healthcare planning often stops at Medicare. However, with rising numbers of individuals retiring before age 65, Quest Commonwealth has stepped up to fill a crucial gap. Approximately one-third of the firm's healthcare clients are not yet eligible for Medicare, and Quest Commonwealth works with them to explore

alternative healthcare options that align with their financial and medical needs.

"Most financial or retirement planning firms focus solely on Medicare when it comes to healthcare planning," said Mike Kania, Retirement Planner at Quest Commonwealth. "But not everyone is eligible for Medicare when they retire, and employers are no longer providing healthcare benefits like they used to. That's where we come in—we help those retirees find the right solutions to ensure continuous coverage without breaking the bank."

Quest Commonwealth's healthcare planning services go beyond basic Medicare selection. For clients under 65, the firm evaluates individual and family health insurance plans, COBRA options, and Affordable Care Act marketplace plans. For Medicare-eligible clients, Quest Commonwealth helps navigate the complexities of Medicare Advantage, supplemental insurance, and long-term care planning. This comprehensive approach ensures that all retirees, regardless of age, have access to tailored healthcare strategies.

One retiree shared their experience, saying, "Mike and Chris (Williams) made it so convenient to have both my financial planning and healthcare handled under one roof. When I retired at 62,

they helped me find affordable coverage until I qualify for Medicare. It's such a relief knowing my retirement plan and health coverage work seamlessly together."

With a commitment to simplifying the process, Quest Commonwealth combines personalized one-on-one consultations with educational resources. The firm also offers workshops and webinars to empower retirees with the knowledge needed to make informed healthcare decisions.

"Healthcare planning is one of the most critical components of a successful retirement strategy," added Kania. "We're here to provide clarity and support, no matter where our clients are on their retirement journey.



Quest Commonwealth - Defenders of Wealth

Whether it's finding pre-Medicare coverage or navigating the complexities of Medicare, we ensure retirees have the guidance they need."

In 2025, Quest Commonwealth plans to further expand its healthcare services, leveraging new tools and partnerships to provide even more robust solutions for retirees. This commitment reflects the firm's mission to offer holistic retirement planning that addresses every aspect of a client's financial future.

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