

9th National Medicare Supplement Insurance Summit

held in conjunction with the

1st National Short-Term Care Insurance Industry Summit

A single conference registration entitles you to attend any session and all meals and receptions.
Sessions shown in **GREEN** will focus on **short-term care insurance**.

Tuesday, April 11, 2017

TIME	LOCATION	AGENDA
8:00 AM - 3:00 PM	Dallas A & D	FREE DAY FOR AGENTS PROGRAM - EXHIBIT HALL IS OPEN

THE PROGRAM LISTED BELOW IS FOR PAID CONFERENCE REGISTRANTS. NAME BADGES REQUIRED TO ACCESS EVENTS

Tuesday, April 11, 2017

TIME	LOCATION	AGENDA
5:15 PM - 7:00 PM	Dallas B / C	WELCOME NETWORKING RECEPTION FOR ALL CONFERENCE ATTENDEES Thank You To Our Reception Sponsor: New Era Life Insurance Companies



Wednesday, April 12, 2017

TIME	LOCATION	AGENDA
6:15 AM	Hotel Lobby	GEN RE ANNUAL 2-MILE FUN RUN to benefit a local charity. MEET IN HOTEL LOBBY

7:15 AM <i>Food services stops at 7:45 A.M.</i>	Dallas B & C	BREAKFAST Welcome Remarks From Today's Breakfast Sponsor: MIB
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Keynote

FUTURE ECONOMIC OUTLOOK AS IT PERTAINS TO HEALTH CARE IN AMERICA

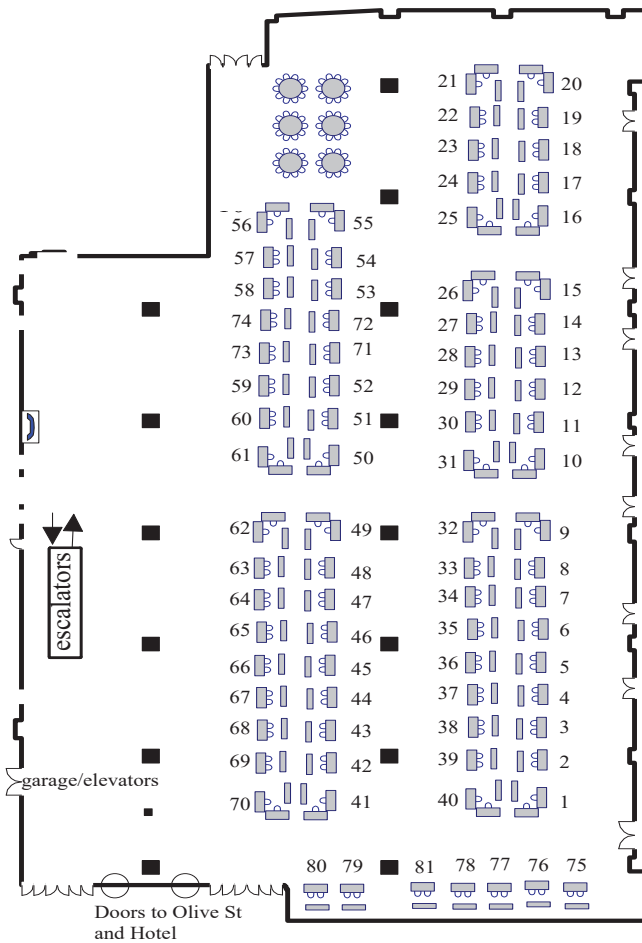
Knight Kiplinger, head of the nation's leading consumer financial magazines and forecasting letters shares forecasts for the post-election landscape ... the U.S. and global economies ... and specifically how it may impact American seniors (your clients and prospects).

Knight Kiplinger, Editor in Chief, Kiplinger Washington Editors, Washington, D.C.

9:00 AM - 10:15 AM	Dallas A 1 - 2	VALUE ADDED PROGRAMS: HOW THEY HELP BUILD CLIENT ACQUISITION In a standardized environment, value added programs and services help differentiate your plan. Program providers share empirical insights into what clients value, what they actually utilize and how value added programs help build client acquisition and can lower Medical Loss Ratios. Suzanne Clough, M.D., Chief Medical Officer, TopDoc, Philadelphia, PA Josh Hoover, Director of Sales, Midwest, EPIC Hearing Healthcare, Minneapolis, MN Mark Lopez, Vice President, Sales, Healthways (Silver Sneakers) Chandler, AZ Ed Braun, President, Your Hearing Network, Somerset, NJ Eddie Maria, Sales Director, TruHearing Network, Sacramento, CA
	Dallas A 3	MACRA IMPLICATIONS: TIME FOR 2020 VISION Understand the Medicare Access and CHIP Reauthorization Act (MACRA with respect to implications on the Medicare Supplement market that will take place in 2020. The time is fast approaching to gauge the impact on your business and strategize for 2020 if not sooner. Ken Clark, Principal and Consulting Actuary, Milliman, Chicago, IL Michelle Rossi, Vice President, Medical Pricing Actuary, Swiss Re, Armonk, NY Rajiv Sood, Vice President, U.S. Medical Risk Origination Leader, Swiss Re, Armonk, NY
	Dallas D 1 - 2	CONSUMER BUYER INSIGHTS: LATEST FINDINGS FROM LEADING RESEARCHERS The latest findings from two highly relevant studies. What Are Age-Ins looking for and other key findings from the Deft Research Age-In and Senior Shopping and Switching studies. George Dippel, Senior Vice President, Deft Research, Minneapolis, MN

Additional session next page

2017 Conference Exhibit Hall



- | | |
|-------------------------------------|---|
| 1 TruHearing, Inc. | 41 Your Hearing Network |
| 2 ARM Leads | 42 TopDoc Connect |
| 3 QLAdmin Solutions | 43 Magnifact |
| 4 The Brokerage, Inc. | 44 America's Health Insurance Plans |
| 5 American National/Standard Life | 45 First Consulting and Admin, Inc. |
| 6 Premier Senior Marketing | 46 United Health Actuarial Svcs, Inc. |
| 7 Mutual of Omaha - MedSupp | 47 Transamerica |
| 8 Mutual of Omaha - LTC, CI, DI | 48 Sentinel Security Life |
| 9 Target Leads | 49 Pinnacle Financial Services |
| 10 Gen Re | 50 UnitedHealthcare |
| 11 Wakely Actuarial | 51 Medico Insurance Company |
| 12 MIB Group, Inc. | 52 LTC Global / United Ins. Group (UIG) |
| 13 CVS / Caremark | 53 ExamOne / Quest Diagnostics Co. |
| 14 Genworth | 54 Kemper Senior Solutions |
| 15 Producers XL | 55 Mindfulware |
| 16 Americo Financial Life & Annuity | 56 Insurance Media Services |
| 17 OneAmerica | 57 Kellogg Insurance Marketing |
| 18 Caggemini | 58 North American Life Plans, LLC |
| 19 Copeland Insurance Group | 59 TRIAD Insurance Administrators |
| 20 Aetna | 60 Milliman |
| 21 AGA - Gain System | 61 AgentCubed |
| 22 NationsHearing | 62 Swiss Re |
| 23 iPipeline | 63 CSG Actuarial |
| 24 Adrea Rubin Marketing | 64 United American Insurance |
| 25 Life Care Funding, Inc. | 65 Healthways - Silver Sneakers |
| 26 Jack Schroeder & Assoc, Inc. | 66 Senior Security Benefits, Inc. |
| 27 Epic Hearing Healthcare | 67 Financial Media Group |
| 28 Nationwide | 68 PRS Insurance Solutions |
| 29 South Shore/Dialog Direct | 69 BenefitMall |
| 30 New Era Life Ins. Companies | 70 National Contracting Center, Inc. |
| 31 Senior Market Sales | 71 Combined Insurance |
| 32 Cigna Supplemental Benefits | 72 The Canadian Medstore |
| 33 Asset Protection Unit, Inc. | 73 National Assoc. of Health Underwriters |
| 34 RGI Data Assets | 74 Agent Pipeline, Inc. |
| 35 Legacy Shield | 75 GoHealth |
| 36 American Specialty Health | 76 Aon Hewitt, Health Solutions Marketing |
| 37 The McNerney Group | 77 LifeSecure Insurance Company |
| 38 Oxford Life Insurance Company | 78 Munich Re |
| 39 Tidewater Management Group | 79 Medicare BackOffice |
| 40 Gordon Marketing | 80 MedigapCRM |
| | 81 Hear USA |

Connect Your Agents With Prospects



Offer a 20% discount for agent listings on the #1 Find A Medicare Supplement Agent Online Directory.

Request a 20% discount you can offer

Speak with Jesse Slome/Mindy Hartman

After the conference

E: jslome@medicaresupp.org

P: 818.597.3205

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1st National Short-Term Care Insurance Industry Summit

9:00 AM - 10:15 AM <i>continued</i>	Dallas D 3	IS SHORT-TERM CARE INSURANCE THE NEXT GROWTH OPPORTUNITY? How two marketing heads for two leading STC insurers view the future for STCi sales. What's fueling consumer interest? What do they know, have they learned that you'll want to hear? Scott Goldberg, President, Bankers Life, Chicago, IL William (Bill) Jetter, Chief Marketing Officer, Aetna, Brentwood, TN
10:45 AM - 12:00	Dallas A 1 - 2	ADVERTISING AND SERVICING ISSUES IN THE ELECTRONIC MILLENIUM Advertising compliance at both the insurer and producer levels continue to be the subject of market conduct reviews. The latest insights to help you identify, assess and control compliance risks associated with advertising for new business as well as servicing your current clients. Vickie Goodman, Consultant, First Consulting and Administration, Inc., Kansas City, MO CJ Rathbun, Sr. Consultant, First Consulting and Administration, Inc., Kansas City, MO Susan Voss, Vice President, General Counsel, American Enterprise Company, Des Moines, IA
	Dallas A 3	UNDERWRITING TRENDWATCH: WHAT CHANGES WILL BENEFIT YOU MOST? Stay ahead in a rapidly changing landscape by hearing insights from leaders in risk assessment tools, prescription and medical history access, underwriter staffing options and tele-underwriting utilizing turnkey underwriting outsourcing. John Najarian, VP Underwriting R&D, Gen Re, Portland, ME Stacy Steuart, Data and Analytics Product Owner, ExamOne, Lenexa, KS Kylee Lacson, Assistant Vice President, The Jacobson Group, Chicago, IL Jose Brito, Director of Underwriting, Equitable Life & Casualty, Salt Lake City, UT
	Dallas D 1 - 2	FUELING CUSTOMER ACQUISITION: DEVELOPING DATA-DRIVEN STRATEGIES How do you find the right customer acquisition opportunities without burning through budget or over-investing in the wrong channels? The latest developments from buying data effectively, to direct response methodology and making the most cost-efficient use of outbound calling. Adrea Rubin, CEO, Adrea Rubin Marketing, New York, NY Lisa Pollack, Vice President, Market Strategy, Adrea Rubin Marketing, New York, NY
	Dallas D 3	STC INSURANCE ACTUARIAL ROUNDTABLE - HOW TO PRICE STC INSURANCE Leading actuaries examine pricing issues for STC policies. How do different benefits and designs impact costs. Considerations for new market entrants; going simple versus going complex. Ken Clark, Principal and Consulting Actuary, Milliman, Chicago, IL Ben Cohen, President and Consulting Actuary, Wakely Actuarial, Palm Harbor, FL Robert Eaton, Consulting Actuary, Milliman, Tampa, FL
12:10 PM	Dallas B & C	LUNCHEON Welcome Remarks From Today's Sponsors: Your Hearing Network and RGI Data Assets    Keynote THINKING BEYOND TODAY: OUR FUTURE DEPENDS ON HOW OTHERS SEE US A highly informed peek behind the Washington D.C. curtains to gain a perspective of future possibilities. The practice of simply 'reacting' to Federal Medicare changes can be fraught with risk. More than ever, thinking beyond today will be critical to the Med Supp industry's future. William Schiffbauer, Partner, Schiffbauer Law Offices, Washington, D.C.
2:00 PM - 3:15 PM <i>Additional sessions next page</i>	Dallas A 1 - 2	FEDERAL / STATE UPDATE: LATEST CHANGES IMPACTING MEDICARE SUPPLEMENT The latest from CMS, the NAIC and State-level changes that impact Medigap plans. Plus, the always-important Q&A segment. Your opportunity to ask the nation's leading experts. William Schiffbauer, Partner, Schiffbauer Law Offices, Washington, D.C. Melissa Taylor, Vice President, Federal Government Affairs, Mutual of Omaha, Omaha, NE Geralyn Trujillo, Exec. Dir., Prod. Policy, America's Health Insurance Plans, Washington DC
	Dallas A 3	THE 2017 MEDIGAP ACTUARIAL FORUM - FACTS TO HELP SAVE YOUR BACON! Our panel of leading actuaries examine relevant topics from maintaining a profitable block of Medicare Supplement insurance to ways to avoid losing your shirt (or blouse) when pricing or re-pricing Medigap. If 'Saving Your Bacon' is important ... don't miss attending. Constance Rogers, Consulting Actuary, United Health Actuarial Services, Rockford, IL Ashlee Borcan, Principal & Consulting Actuary, Milliman, USA, Tampa, FL

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2:00 PM - 3:15 PM
continued

Dallas D 1 - 2

8 MILLION MED SUPP CONSUMER QUOTES LATER, HERE'S WHAT WE SEE

Data gleaned from running 8 million Medicare Supplement quotes. Programming imbedded in quote engines provides valuable insight into how insurance agents think and present Med Supp solutions to their clients. This is the first time a study of this magnitude has been conducted!
Bryan Neary, Principal and Consulting Actuary, CSG Actuarial, Omaha, NE

Dallas D 3

FILING STCi & COMPLIANCE ISSUES: THE LATEST AND AN OUTLOOK

Hear the latest of what States look for when filing STC products to what's happening as the NAIC starts to take a greater look at STCi policies. Vital info if you are considering entering the STCi world.
Susan Voss, Vice President, General Counsel, American Enterprise Company, Des Moines, IA
Robert Eaton, Consulting Actuary, Milliman, Tampa, FL

3:15 PM - 3:45 PM

Exhibit Hall

BREAK Thank You To Today's Coffee Break Supporter: **AmeriLife**

3:45 PM - 5:00 PM

Dallas A 1 - 2

2017 MEDICARE SUPPLEMENT CHIEF EXECUTIVE OFFICER (CEO) FORUM

The perennial favorite of attendees: Heads for Med Supp product lines gather again to share thoughts regarding market changes and opportunities. More than just an opportunity to listen, a chance to ask questions in what is always a lively open discussion among the industry's 'architects of tomorrow'.

Moderator: Steve Najjar, Executive Vice President, Health and Special Risk, Hannover Re, Orlando, FL

CEOs: Steve Jones, President, Cigna Supplemental Benefits, Nashville, TN

Tom Swank CEO American Enterprise/Medico Insurance Company, Omaha, NE

Ty Wooldridge, President, Aetna Senior Supplement, Nashville, TN

Dallas A 3

IMPLEMENTING A MULTI-CHANNEL DISTRIBUTION STRATEGY TO MAXIMIZE SALES

Success today often mandates multiple distribution strategies. Maximizing success involves successfully tying it all together which is much easier said than done. Hear what's worked for those who have successfully navigated a multi-channel approach.

Dwane McFerrin, VP, Medicare Solutions, Senior Market Sales, Omaha, NE

Michael Vietri, Chief Marketing Officer, AmeriLife Group LLC, Clearwater, FL

Derek Richardson, President, Brokerage Distribution, AmeriLife, Clearwater, FL

Dallas D 1 - 2

A FOCUS ON EMPLOYER-GROUP MED SUPP OFFERINGS

As Baby Boomers continue to age into Medicare, hear the latest regarding employer-sponsored group plans that supplement Medicare. Group Med Supp pricing issues, state issues and trends.

Trish Angels, Assistant Director, Group Retiree Health, The Hartford, Hartford, CT

Marie Pero, Sr. Director, Group Retiree, United Healthcare, Philadelphia, PA

Dallas D 3

SHORT-TERM CARE RE-INSURANCE 101

Everything you need to consider (and know) from the perspective of reinsurers active in the short-term care insurance marketplace.

Winona M. Berdine, Vice President, RGA Reinsurance Group of America, Chesterfield, MO

Bruce Stahl, Vice President and Actuary, RGA Reinsurance Company, Chesterfield, MO.

5:15 PM - 7:00 PM

Dallas B & C

NETWORKING RECEPTION

Thank You To Our Reception Sponsor: **USA Senior Care**



Thursday, April 13, 2017

7:15 AM

*Food services stops
AT 7:45 A.M.*

Dallas B / C

BREAKFAST

Keynote

LOOKING BACK, LOOKING FORWARD

Reflections on how we arrived at where we are today. More important, what challenges, changes and positive opportunities are we most likely to encounter in the coming years.

Gerilyn Trujillo, Exec. Dir., Prod. Policy, America's Health Insurance Plans, Washington DC

9:00 AM - 10:15 AM

Additional sessions next page

Dallas A 1 - 2

TECH TOOLS SHOWCASE: BUILD SALES & DISTRIBUTION HERE

Leading edge tech-focused companies showcase latest products, tools and technologies for distributors (agencies) ... insurers ... anyone who wants to build distribution and sales and be not just one ... but many steps ahead of the competition.

Ali Hall, Vice President, Sales, AgentCubed, LLC, Neptune Beach, FL.

Daniel Joye, President, Mindfulware, Montgomery, AL

Rich Grisham, Associate Vice President. iPipeline, Philadelphia, PA.

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9:00 AM - 10:15 AM <i>continued</i>	Dallas A 3	<p>RATE TRENDS IN THE MARKETPLACE</p> <p>A comprehensive look at the important rate trends impacting Med Supp. What's happening at state levels, the impact in the most competitive and least competitive states? Learn the latest factors that are altering rate trends and competitiveness with a bit of future forecasting.</p> <p>Andy Baillargeon, Vice President and Chief Pricing Officer, Gen Re, Portland, ME Doug Feekin, Principal and Consulting Actuary, CSG Actuarial, Omaha, NE</p>
	Dallas D 1 - 2	<p>GETTING TELESALERS RIGHT: BEST PRACTICES -- BUY OR BUILD FOR SUCCESS</p> <p>Telesales is an increasingly important component for sales growth, distribution diversification and profitability. Experts explore best practices for a viable tele-sales distribution channel. Do you buy or build. What should you expect for sales through this channel?</p> <p>John Sowell, Head of Medicare Strategic Distribution, Aetna, Franklin, TN Ali Hall, Vice President, Sales, AgentCubed, LLC, Neptune Beach, FL Chris Mele, Contact Center Solutions Leader, Aon Retiree Health Solutions, Hartford, CT</p>
	Dallas D 3	<p>STC INSURER ROUNDTABLE: A FOCUS ON BUILDING YOUR AGENCY'S SALES</p> <p>A special session for distributors and producers who want to know the best and fastest ways to start successfully marketing STCi policies from leading STC insurers.</p> <p>Jack Broughton, Vice President, Kemper Senior Solutions, Oklahoma City, OK Debie Knowles, Vice President, CMO, Standard Life and Accident, Houston, TX Steve Patton, Senior Director, Product and Market Strategies, Aetna, Franklin, TN Dave Peters, Vice President of Sales, Chief Marketing Officer, Medico, Omaha, NE Moderator: Barbara Stahlecker, Ntl Marketing Dir, Premier Companies, Norfolk, NE</p>
10:15 AM - 10:45 AM	Exhibit Hall	BREAK
10:45 AM - 12:00	Dallas A 1-2	<p>DISTRIBUTOR-INSURER ROUNDTABLE: FORGING FUTURE GROWTH TOGETHER</p> <p>Insurance distribution is changing. Future success requires ever-evolving partnerships and key industry players hold an open discussion to address the future and address your questions.</p> <p>Mel Copeland, President, Copeland Insurance Group, Longview, TX Angela Palo, Executive Vice President, Pinnacle Financial Services, Warminster, PA Sylvia Gordon, President, Gordon Marketing, Noblesville, IN Christian Novacek, Vice President, Marketing & Sales Strategy, Bankers Fidelity, Atlanta, GA Steve Patton, Senior Director, Product and Market Strategies, Aetna, Franklin, TN</p>
	Dallas A 3	<p>NEW TO MARKET FLOPS & FAUX PAS: WHAT HAPPENED, WHAT WAS LEARNED</p> <p>Some new Med Supp products or initiatives simply do not capture the market the way the company had in mind. What makes a bad new market launch? What were the reasons results were not achieved and what you can learn to avoid repeating what turned out to be a 'formula for failure'.</p> <p>Victor Castellanos, Vice President, Swiss Re, Orlando, FL Bill Reynolds, Consulting Actuary, Wakely Actuarial Services, Tampa, Florida</p>
	Dallas D 1 - 2	<p>DIRECT MARKETING / RESPONSE SHOWCASE: FOCUS ON LEAD GENERATION</p> <p>The latest tools, tips and techniques used by direct response leaders. In an increasingly competitive world, what are the best practices that can help you operate more efficiently, save money and significantly build your sales funnel.</p> <p>Richard Bufkin, President and CEO, Senior Direct, Inc. / Target Leads, Monterey, CA Joe Lombardo, General Manager, ARM Leads, Flower Mound, TX Chris York, Vice President, Sales, South Shore, Dialog Direct, Hinckley, OH</p>
	Dallas D 3	<p>WHAT WE'VE LEARNED: DIFFERENCES BETWEEN STC AND LTC UNDERWRITING</p> <p>Proper underwriting makes all the difference in the long-term viability and health of your block of business. Understand what's been learned along the way and ask our experts your vital questions.</p> <p>Kathryn Lee, FLMI, Director, Underwriting, Medico Insurance Company, Omaha NE Gail Mitchell, Vice President, Underwriting, CNO Financial Group (Bankers Life), Chicago, IL</p>



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9th National Medicare Supplement Insurance Summit

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12:10 PM

Dallas B & C

LUNCHEON

Keynote

DISRUPT AGING: A BOLD NEW PATH TO LIVING YOUR BEST LIFE AT EVERY AGE
Charlotte S. Yeh, MD FACEP, Chief Medical Officer, AARP Services, Inc., Washington, D.C.

2:00 PM - 3:15 PM

Dallas A 1 - 2

HOW DO YOU CULTIVATE, DEVELOP & RETAIN TALENTED AGENTS

Strategies to catch the attention of the top talent in your area (and beyond) -- and keep it. You can waste a lot of time trying to cultivate agents who don't produce. Learn what works from experienced national distributors who have recruited and developed thousands of agents.

Paul Rose, Co-CEO, Western Asset Protection, Phoenix, AZ
Mari Rose Tautimes, Co-CEO, Western Asset Protection, Phoenix, AZ
William Pellegrini III, President, Pellegrini and Associates, Phoenix, AZ.
Albert Robledo, CEO, PTT Financial, Harlingen, TX.

Dallas A 3

CLAIMS: FROM BETTER FRONT END MANAGEMENT TO BETTER DATA MINING

Two experts explore claims management strategies designed to reduce eligibility issues, avoid overpayments and redundant payments that affect bottom line profitability. The potential dollar savings can be significant. Hear how to recoup 80% without making your customers mad.

Jim DelVecchio, CEO, Asset Protection Unit, Inc., Amarillo, TX
Eric Hafsoos, Business Development Manager, OnCourse Information Services, Milwaukee, WI

Dallas D 1 - 2

MEDICARE EXCHANGES: WHAT DOES THE DATA TELL US?

A look at Medicare Exchanges and the enrollment trends over the last few years. How are these trends changing and how innovation is impacting results.

Kris Schneider, VP, Con. & Carrier Engagement, Aon Retiree Health Solutions, Milwaukee, WI
Ross Kozlowski, Director, Data Analytics, Aon Retiree Health Solutions, Lincolnshire, IL

Dallas D 3

EXIT STRATEGIES FOR AGENCY OWNERS: EXIT, PARTNER or INTEGRATE

At some point agency owners have to make a critical decision regarding their best exit strategy. Do you sell? Do you partner/merge? Do you become a fully integrated satellite office?

Daniel G. Schmedlen, Chief Executive Officer, LTC Global Group of Companies, Fort Myers, FL

3:45 PM - 5:00 PM

Dallas A 1 - 2

APPLICATION PROGRAM INTERFACE; VITAL TECHNOLOGY FOR YOUR FUTURE

APIs are reshaping web-based services in all industries, including insurance in a big way. Learn the API basics and hear how insurers/distributors leverage APIs to increase speed of play, develop innovative new services, and gain competitive advantages. How your business benefits from APIs.

Sam Halpern, Director of Internet Marketing, Senior Market Sales, Milwaukee, WI
Matt Parker, Vice President, Consumer Engagement, Connecture, San Francisco, CA

Dallas A 3

ELECTRONIC DATA & PREDICTIVE ANALYTICS FOR IMPROVED UNDERWRITING

Combining prescription history with medical billing data can identify conditions and help improve underwriting results. Discover how applicant data powered by predictive analytics can more effectively manage risk management--accelerating and improving risk assessment.

Neeraj Bhatti, Senior Account Executive, Milliman, Dallas, TX

Dallas D 1 - 2

HEARING LOSS AMONG SENIORS: LATEST TRENDS, CONSUMER PREFERENCES

Almost one out of two Medicare enrollees have hearing loss, with significant impact to quality of life and longevity. Understand the impact of untreated hearing loss on co-morbidities and medical costs. Learn how you can bring added value and improved wellness through a well managed hearing program.

Vicki Hamill, Au.D., Director of Quality Management, HearUSA, Palm Beach Gardens, FL
John Laftsidis, Director of Managed Care, HearUSA, Palm Beach Gardens, FL

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