



# 2018 MEDICARE & SENIOR INSURANCE PRODUCTS SALES SUMMIT

## Selling Medicare Supplement Track

### MAJESTIC BALLROOM A-B-C

TIME	SESSION # - TITLE - PRESENTER
8:30 AM	<b>1. MARKET OVERVIEW: THE LATEST DATA FOR MED SUPP AND MEDADVANTAGE SALES - TRENDS - FORECASTS</b> Doug Feekin, Principal & Consulting Actuary, CSG Actuarial
9:00	<b>2.. LEGISLATIVE UPDATE FOR MEDICARE INSURANCE PRODUCERS - FEDERAL &amp; STATE INITIATIVES &amp; ISSUES</b> John Greene, VP Cong. Affairs, Ntl.Assoc of Health Underwriters
9:30	<b>3. THE BETTER TARGET MARKET: SUCCESSFULLY SELL MED SUPP TO CONSUMERS 70 AND OLDER</b> Devin Rubin, Managing Dir., Golden Years Design Benefits
10:00	<b>4. USING TECHNOLOGY TO BUILD &amp; GROW YOUR MEDICARE SALES - FROM LEADS TO APP TO REFERRAL GENERATION</b> Craig Ritter, President, Ritter Insurance Marketing
10:30	<b>5. SEMINAR SUCCESS: HOW TO BUILD YOUR MEDICARE BUSINESS WITH FILLED ROOM SEMINARS</b> Howard Peck, President, Senior Insurance Solutions, LLC.
11:00	<b>MEET TODAY'S PROGRAM TRACK SPONSOR</b> <b>Integrity Marketing Group</b> Denis Tauscheck, Chief Revenue Officer, Integrity Marketing Grp
11:15	<b>6. MED SUPP SALES LEADING PRODUCER ROUNDTABLE</b> Leading producers who each sell numerous Medigap policies yearly, share how they get more prospects, run an effective profitable business, close sales and cross sell clients.  Time for Q&A with these leading producers Presented by Integrity Marketing Group
12:15 PM	<b>7. SMALL GROUPS: GENERATING BIG MEDIGAP BUSINESS BY WORKING THE SMALL GROUP MARKETPLACE</b> Mary Anna DeMas and Marie Pero, UnitedHealth Group
12:45	<b>8. HIGH DEDUCTIBLE PLAN F: THE MOST MISUNDERSTOOD MEDIGAP PLAN</b> Ryan Sykes, Ntl Dir of Sales, United American/Globe Life of NY
1:15	<b>9. WHAT TOMORROW'S MEDICARE AGENT WILL LOOK LIKE - WHAT TOOLS THEY'LL USE / HOW THEY'LL WORK</b> Jason McClellan, CEO, Insurance Advisors, Inc.
1:45	<b>10. CEO PANEL - PART 1 - WHAT'S NEW IN MED SUPP ? MEDIGAP INSURER CEOS SHARE AND ANSWER QUESTIONS</b> Presented by Integrity Marketing Group
2:15	<b>11. CEO PANEL - PART 2 - WHAT'S IN STORE TOMORROW ? MEDIGAP INSURER CEOS TALK ABOUT WHAT'S COMING NEXT</b> Presented by Integrity Marketing Group
2:45	<b>12. HEARING COVERAGE: HOW TO DISTINGUISH YOURSELF &amp; COMPETE IN AN OTHERWISE HOMOGENIZED MARKETPLACE</b> Dennis Cash, Director of Strategic Initiatives, Ameritas

## Selling Medicare Advantage & PDP Plans

### LANDMARK BALLROOM 1-2-3

TIME	SESSION # - TITLE - PRESENTER
9:00 AM	<b>13. MEDICARE ADVANTAGE AND PRESCRIPTION DRUG 101</b> A comprehensive examination of these plans and options to help you better support clients and prospects as they compare and plan.  Approved for 2 HOURS of CE I (Except NE, SD, ND, MT, OK & LA. ) Details re: CE credit will be shared at the beginning of the session. Anthony Bahr, VP of Marketing, Jack Schroeder & Associates
11:00	<b>14. EMERGING MED ADV LEGISLATIVE LANDSCAPE IN THE TRUMP ADMINISTRATION: WHAT CHANGES MAY LIE AHEAD</b> John Greene, VP Cong. Affairs, Ntl.Assoc of Health Underwriters
11:30	<b>MEET TODAY'S PROGRAM TRACK SPONSOR</b> <b>Jack Schroeder &amp; Associates</b> Anthony Bahr, VP of Marketing, Jack Schroeder & Associates
11:45	<b>15. COMPLIANCE IN THE MEDIARE MARKET: HOW TO AVOID NON-COMPLIANCE &amp; CMS VIOLATIONS</b> Austin Felch, Compliance Specialist, Jack Schroeder & Assoc.
12:15	<b>16 10 TIPS &amp; TACTICS FOR SUCCESS: WHAT WORKS FOR OUR TOP MEDICARE ADVANTAGE PRODUCERS</b> Craig Taylor, Assoc. Dir. Med Solutions, Senior Market Sales, Inc.
12:45	<b>17. HOW TO MOST EFFECTIVELY TARGET MED ADVANTAGE PROSPECTS: TIPS &amp; TECHNIQUES FROM A REAL PRO</b> Mike Smith, President, The Brokerage, Inc.
1:15	<b>18 SELLING HOSPITAL INDEMNITY PLANS: AN AFFORDABLE SOLUTION TO RISING MEDICARE ADVANTAGE CO-PAYS</b> Carl Leader, Senior VP, Sales & Marketing, Guarantee Trust Life
1:45	<b>19. HOW TO GRASS ROOTS MARKET YOURSELF FOR MORE MEDICARE ADVANTAGE PROSPECTS</b> Tracy Bryant, VP Senior Products, Excelsior Insurance Brokerage
2:15	<b>20. LOCK-IN MED ADVANTAGE BUSINESS FROM JAN - OCT SPECIAL NEEDS PLANS, AN OPPORTUNITY TO DISCOVER</b> Bill Kiray, VP, Chief Marketing Officer, Neishloss & Fleming
2:45	<b>21. MED ADVANTAGE LEAD GENERATION: CONDUCTING A COMPLIANT &amp; STILL EFFECTIVE PROSPECTING CAMPAIGN</b> Candace Reistrom, Medicare Agent, Saint Petersburg, FL

**2 Additional Tracks  
of Sessions  
See Inside**

**THE FREE DAY PROGRAM CONCLUDES AT 3:00 PM**



# 2018 MEDICARE & SENIOR INSURANCE PRODUCTS SALES SUMMIT

## Selling Senior Insurance Products LANDMARK BALLROOM 5-6-7

TIME	SESSION # - TITLE - PRESENTER
8:00 AM	<b>22. HIGHLIGHTS FROM THE SOCIETY OF CERTIFIED SENIOR ADVISORS (CSA) DESIGNATION COURSE</b> CSA Designation Strategies: How to create and develop a broader local network to grow your senior clientele. Jim McCabe, Ph. D., CSA Course Instructor
9:00 AM	<b>23 . HIGHLIGHTS FROM THE SOCIETY OF CERTIFIED SENIOR ADVISORS (CSA) DESIGNATION COURSE</b> Financial & Estate Planning for Age 65 and Older - Overview enabling you to generally discuss and raise questions. Mickey Batsell, CLU, MBA, CSA, CSA Course Instructor
10:00	<b>24. SELLING FINAL EXPENSE: STOP LEAVING MONEY ON THE TABLE</b> Ed Porter IV, National Sales Director, Sentinel Security Life
10:30	<b>25. SENIOR DENTAL INSURANCE: MARKET TRENDS AND CROSS SELLING TIPS</b> Diego Coig, Regional Managing Director, Ameritas
11:00	<b>26. A COMPARISON OF SENIOR DENTAL PRODUCTS AND HOW TO SUCCESSFULLY SELL THEM</b> Craig Taylor, Associate Director, Senior Market Sales
11:30	<b>27. THE NEW LTC TALK: HOW TO SUCCESSFULLY TALK &amp; SELL THE NEW LONG-TERM CARE SOLUTIONS</b> Angie Hughes, LTC Marketing Director, ProducersXL
12:00 PM	<b>28. SHORT TERM CARE &amp; THE HOME HEALTH CARE PLAN OPTION</b> Jack D. Broughton, Vice President, Kemper Senior Solutions
12:30	<b>29. TRANSITIONING INTO THE LINKED BENEFIT (LIFE / LTC ANNUITY / LTC) SALE - WHAT YOU NEED TO KNOW!</b> Keith Bercun, Regional Marketing Director, OneAmerica
1:00	<b>30. ADD ANNUITIES TO YOUR PRACTICE &amp; EARN UPWARDS OF \$50,000 SELLING JUST 1 POLICY PER MONTH</b> Bob Brzyski, VP - Life, Annuity, Pinnacle Financial Services
1:30	<b>MEET TODAY'S PROGRAM TRACK SPONSOR</b> Producers XL Angie Hughes, LTC Marketing Director, Producers XL
1:45	<b>31. POSITIONING CANCER PLANS: HOW TO EASILY INCLUDE THEM IN YOUR PRODUCT PORTFOLIO</b> Melissa Duong, Regional Vice President, Cigna
2:15	<b>32. ONE AGENT - 12 POLICIES A WEEK: SELLING HOME HEALTH CARE WITH A PRESCRIPTION DRUG BENEFIT</b> Mike Roth, President, Senior Insurance Marketing

## Lead Generation & Social Media for Leads LANDMARK BALLROOM 4

TIME	SESSION # - TITLE - PRESENTER
8:00 AM	<b>33. 30 MINUTES TO A LinkedIn PROFILE THAT GETS LEADS AND SETS YOU APART FROM ALL OTHER MEDICARE AGENTS</b> Jesse Slome, Dir., Medicare Supplement Insurance Association
8:30	<b>34. 5 BEST TIPS THAT HELP TOP PRODUCERS MAKE MORE MONEY USING THEIR PHONE TO SELL TO SENIORS</b> Gary Prado, CEO, SalesDialers.com
9:00	<b>35. IN-HOME LEADS: EFFECTIVE IN-HOME AND APPOINTMENT SETTING STRATEGIES</b> David Mc Nerney , Senior Marketing Specialists
9:30	<b>36. TACTICS TO INCREASE YOUR RESPONSE RATES - WHAT'S WORKING FOR OTHER INSURANCE AGENTS</b> Joe Lombardo, General Manager, ARM Leads
10:00	<b>37. FACEBOOK FOR AGENTS: WHY AND HOW TO USE THE #1 SOCIAL MEDIA PLATFORM FOR AGENTS</b> Olivia Richardson, Senior Marketing Specialists
10:30	<b>38. HOW TO ORDER MEDICARE LEADS TO MAXIMIZE YOUR RESPONSE &amp; MINIMIZE YOUR COST</b> Richard Bufkin, President, Target Leads
11:00	<b>39. BEST WAYS TO APPROACH DIRECT MAIL REPLIES TO GET APPOINTMENTS THAT RESULT IN SALES</b> Lloyd Lofton, 7 Figure Sales Tools
11:30	<b>40. MULTI-TOUCH CAMPAIGNS ARE MORE EFFECTIVE: HOW TO SUCCESSFULLY IMPLEMENT ONE</b> Chris York, South Shore / Kramer Direct
12:00	<b>41. LEAD SOURCES YOU'LL NEVER HAVE TO PAY FOR - GREAT TACTICS ANY AGENT CAN DO</b> Mike Gragg, Executive Director, National Contracting Center
12:30	<b>MEET TODAY'S PROGRAM TRACK SPONSOR</b> Senior Marketing Specialists JoAnn Wray, President, Senior Marketing Specialists
12:45	<b>42. MANAGING AN AGENCY LEAD SYSTEM: EFFECTIVE LEAD MANAGEMENT FROM 2 AGENTS TO 200</b> Dan Mangus, Senior Marketing Specialists
1:15	<b>43. MINIMIZING WASTE &amp; MAXIMIZING PROFITS: HOW TO SEE AND EXTRACT VALUE FROM LEADS YOU ALREADY HAVE</b> Antonio Franzese, CEO, Precise Leads
1:45	<b>44. NO BUDGET ? NO PROBLEM ! MOST EFFECTIVE WAYS THAT WORK TO GENERATE LEADS</b> Jeremy Harrison, Owner, 818 Inc.

**THE FREE DAY PROGRAM CONCLUDES AT 3:00 PM**

All sessions are filmed for online access.

Watch sessions filmed at prior Medicare Sales Summits

[www.MedicareSupp.org/library](http://www.MedicareSupp.org/library)