



# 2018 MEDICARE SUPPLEMENT INSURANCE SUMMIT CONFERENCE PROGRAM

## TUESDAY, JUNE 12, 2018

TIME	LOCATION	AGENDA
8:00 AM - 3 PM		EXHIBIT HALL OPEN - 45 SALES SESSIONS - Pick Up The Special Program
5:15 - 7:00 PM	Exhibit Hall & Majestic Foyer	OPENING NETWORKING RECEPTION <b>RECEPTION SPONSOR - NEW ERA LIFE INSURANCE COMPANY</b>

## WEDNESDAY, JUNE 13, 2018

TIME	LOCATION	AGENDA
6:15 AM	Hotel Lobby	GEN RE ANNUAL FUN RUN / WALK to benefit Angel's Arms. Meet in Hotel lobby. 
7:15 AM	Landmark 4 - 7	<b>1 - BREAKFAST</b> <b>BREAKFAST SPONSORS - PINNACLE FINANCIAL SERVICES, INC. and the SOCIETY OF CERTIFIED SENIOR ADVISORS</b>  <b>KEYNOTE: HOW TO SURVIVE CAREGIVING WITH SANITY AND A SENSE OF HUMOR</b> Jim Comer, Author of When Roles Reverse, Austin, TX
9:00 - 10:15 AM	Majestic A-B-C	<b>2 - 2018 TECHNOLOGY SHOWCASE: NEW FRONTIERS FOR MEDICARE SUPPLEMENT</b> See the latest from leading technology providers and innovators who are driving the industry forward. Experts take the stage to showcase new, existing and coming products, services and solutions. <b>Moderator:</b> Peter Filippini, Vice President, Business Development, GoHealth, Chicago, IL Rich Grisham, AVP of Sales Operations, iPipeline, Exton, PA Ali Hall, Vice President of Sales, AgentCubed, Jacksonville, FL Matt Leonard, Director, Medicare Product Management, Omaha, NE Tom Pitcheralla, Managing Director, Quattro, Berwyn, PA Constance Rodgers, COO, Mindfulware, Montgomery, AL Aaron Sims, President, Enroll Me, LLC, Kansas City, MO
	Landmark 1-2-3	<b>3 - LIFE AFTER PLANS F &amp; C - WHAT'S NEXT, TOP NATIONAL EXPERTS FORECAST</b> What's the future look like after Plans F & C fade? This cross section of experts shares what they see in their crystal ball for carriers - employers and retirees. <b>Moderator:</b> Kris Schneider, VP, Consumer & Carrier Engagement, Aon Retiree Health Solutions, Chicago, IL Pat Fleming, Chief Operating Officer, Senior Supplemental Insurance, Aetna, Chicago, IL Lin Lin, Medical Reinsurance Actuary, Swiss Re America Holding Corporation, Armonk, NY Kim Patterson, Chief Compliance Officer, Agent Pipeline, Charleston, WV Adam Wasmund, Chief Marketing Officer, Jack Schroeder & Associates, Ft. Myers, FL
	Crystal Ballroom Grand Tower - 20 Fl.	<b>4 - 2018 MEDICARE SUPPLEMENT INDUSTRY OVERVIEW: LATEST DATA, TRENDS &amp; OUTLOOK</b> Latest key trends identified from 2017 national studies including buyers, shifts among standardized plans, key industry players. Plus the latest premium and loss information. What the experts see ... what surprised them ... and how this could impact future trends. <b>Ryan Wolfe, General Manager, Mark Farrah Associates, Pittsburgh, PA</b> <b>Jared Strock, Consulting Actuary, CSG Actuarial, Omaha, NE</b>
	Statler Ballroom Grand Tower Lobby	<b>5 - MEDIGAP DISTRIBUTOR ROUNDTABLE: DRIVING TOWARDS FUTURE GROWTH &amp; SUCCESS</b> A panel of Med Supp distributors and insurers share their visions for succeeding in the future. What issues and risks concern them most? What strategies are they undertaking to prepare for the future? How are they gearing up to compete with industry "disrupters" and technological innovations? <b>Moderator:</b> Ryan Kimble, President, Agent Pipeline, Inc., St. Albans, WV <b>Bill Jetter, Chief Marketing Officer, Aetna Senior Supplement Insurance, Franklin, TN</b> <b>Jason McClellan, CEO, Insurance Advisors Direct, Novi, MI</b> <b>Dave Peters, VP Sales, Chief Marketing Officer, Medico Insurance Company, Omaha, NE</b>

Food service ends at 7:45  
when our program begins

10:15 - 10:45 AM	Exhibit Hall	<p>Coffee Available in the Exhibit Hall  <b>COFFEE SPONSOR - AMERICO</b></p>
10:45 - 12:00 PM	Majestic A-B-C	<p><b>6 - FEDERAL UPDATE: LEGISLATIVE &amp; REGULATORY CHANGES &amp; FUTURE LANDSCAPE</b>  An up-to-the-day briefing of the changes that are or will impact Medigap plans and a look at the landscape from those embedded in the trenches. Your opportunity to ask questions and hear those raised by your peers from across the industry.  <b>John Greene, VP of Congressional Affairs, National Association of Health Underwriters, Washington, D.C.</b>  <b>Heather Jerbi, Exec. Director Product Policy, America's Health Insurance Plans (AHIP), Washington, D.C.</b>  <b>William Schiffbauer, Partner, Schiffbauer Law Offices, Washington, D.C.</b></p>
	Landmark 1-2-3	<p><b>7 - SUCCESS WITH COMPLIMENTARY SENIOR PRODUCTS: DISTRIBUTOR ROUNDTABLE</b>  What's working for distributors who want to increase revenues ... increase distribution ... and lessen their future dependence on a single product category. What products best compliment a senior / Medicare-focused agency? Hear what's working and missteps to avoid when expanding your footprint.  <b>Moderator: Taylor Martin, Chief Marketing Officer, Senior Security Benefits, Inc., Fort Worth, Texas</b>  <b>Tracy Bryant, Vice President, Senior Products/Brokerage Sales, Excelsior Insurance Brokerage, TX</b>  <b>Craig Taylor, Associate Director, Medicare Solutions, Senior Market Sales, Omaha, NE</b>  <b>Denis Tauscheck, Chief Revenue Officer, Integrity Marketing Group, Madison, WI</b></p>
	Crystal Ballroom Grand Tower - 20 Fl.	<p><b>8 - LATEST FINDINGS FROM THE 2018 NATIONAL AGE-IN STUDY OF CONSUMERS</b>  In a world where attitudes and behaviors seem to virtually change overnight, an opportunity to hear the latest benchmark study of Medicare eligibles. What role does health insurance now play? Are Boomers' wants, needs and behaviors different? What do consumers want from agents?  <b>Tim Brousseau, Vice President Client Services, Deft Research, Minneapolis, MN</b></p>
	Statler Ballroom Grand Tower Lobby	<p><b>9 - TELEMEDICINE AND MEDICARE: MARKET TRENDS, ANALYSIS &amp; FUTURE FORECAST</b>  Medicare Advantage plans already have the flexibility to provide coverage for tele-health services. A recent study found 92% of employers offered tele-health services. Experts share the latest developments that will undoubtedly impact Medicare plans and opportunities for those prepared.  <b>Moderator: Ken Clark, Principal and Consulting Actuary, Milliman, Chicago, IL</b>  <b>Susan Philip, Senior Healthcare Management Consultant, Milliman, San Francisco, CA</b></p>
12:00 PM	Landmark 4 - 7	<p><b>10 - NETWORKING LUNCHEON</b>  <b>LUNCHEON SPONSORS - RGI DATA ASSETS and YOUR HEARING NETWORK</b>  <b>KEYNOTE: REGULATORY UPDATE: NAIC PERSPECTIVES ON SIGNIFICANT MATTERS</b>  An overview of what's taken place ... what's relevant to the Medigap industry.  <b>David Torian, Counsel &amp; Health Policy Analyst, Ntl. Assoc. of Insurance Commissioners, Washington D.C.</b></p>
2:00 - 3:15 PM	Majestic A-B-C	<p><b>11 - STATE LEGISLATIVE UPDATE: LATEST NAIC AND STATE INITIATIVES</b>  What's going on across the nation that is relevant to those targeting Medicare eligibles (seniors) -- including the latest from the Spring NAIC Conference + a look at Recovery Care (Short-term health care regulations). The latest information from a panel of national experts working with States.  <b>Heather Jerbi, Exec. Director Product Policy, America's Health Insurance Plans (AHIP), Washington, D.C.</b>  <b>William Schiffbauer, Partner, Schiffbauer Law Offices, Washington, D.C.</b>  <b>David Torian, Counsel &amp; Health Policy Analyst, Ntl. Assoc. of Insurance Commissioners, Washington D.C.</b>  <b>Susan Voss, Vice President, General Counsel, American Enterprise Company, Des Moines, IA.</b></p>
	Landmark 1-2-3	<p><b>12 - LEAD OPTIMIZATION: HITTING A LEAD GEN HOME RUN</b>  A cross section of leading experts explores latest models and specific examples of campaigns and technologies to deliver leads most likely to result in a quote and policy.  <b>Moderator: Richard Bufkin, President, Target Leads, Rockwall, TX</b>  <b>Antonio Franzese, Founder &amp; CEO, Precise Leads, New York, NY</b>  <b>Jeff Piotrowski, Senior Director of Insurance, Jornaya, Philadelphia, PA</b>  <b>Rick Wilson, Director of ListGiant Portal, Thousand Oaks, CA</b>  <b>Chris York, Senior Vice President and General Manager, Dialog Direct, Highland Park, MI</b></p>
	Crystal Ballroom Grand Tower - 20 Fl.	<p><b>13 - ADMINISTRATIVE LESSONS LEARNED BY NEW INDUSTRY PLAYERS</b>  In a highly competitive industry, your administrative decisions can be the difference between success (profits) and failure (losses). Valuable insights and real world experiences from those who help new entrants seeking the best policy pricing, technology and administrative support (all key ingredients).  <b>Moderator: Daniel Acker, President &amp; CEO, Sentinel Security Life Insurance Company, Salt Lake City, UT</b>  <b>Thomas Dimmer, Vice President, Business Development, Renaissance Life &amp; Health, Salt Lake City, UT</b>  <b>Mark McKeithen, Director Operations, CapGemini, Pensacola, FL</b></p>

2:00 - 3:15 PM  
Continued

Statler Ballroom  
Grand Tower Lobby

#### 14 - ARE YOU MACRA READY?

A deep dive into understanding the different dynamics of how MACRA may be expected to impact pricing/experience, product development, and strategy for newly eligibles and existing policies.

**Moderator:** Ken Clark, Principal and Consulting Actuary, Milliman, Chicago, IL  
Connie Rogers, Consulting Actuary, United Health Actuarial Services, Belvidere, IL

3:15 - 3:45 PM

Exhibit Hall

Coffee Afternoon Break - Available in the Exhibit Hall

**COFFEE & BREAK SPONSORS - CAPGEMINI & DATA DECISIONS**

3:45 - 5:00 PM

Majestic A-B-C

#### 15 - THE 2018 MEDICARE SUPPLEMENT INDUSTRY LEADERS' TOWN HALL

A panel of esteemed industry leaders and experts - from CEOs to directors of strategic business functions - examine the state of the Med Supp business today and share points of view about how it may evolve. Hear their issues, concerns and outlook. Share yours and ask questions.

**Moderator:** Steve Woods, VP New Business Development, Gen Re, South Portland, ME  
Jose Brito, Chief Operating Officer, Equitable Life & Casualty Insurance Company, Salt Lake City, UT  
Kevin Dill, President and COO, Unified Life Insurance Company, Kansas City, MO  
Charlie Harris, President, National Health Insurance Company, Dallas, TX  
Ashlee Mouton Borcan, FSA, MAAA, Principal & Consulting Actuary, Milliman, Tampa, FL  
JoAnn Wray, President, Senior Marketing Specialists, Columbia, MO

Landmark 1-2-3

#### 16 - CALL CENTERS: LATEST TRENDS AND TECHNOLOGIES THAT BOOST PERFORMANCE

Consumer demands for exceptional, real-time service continue to transform the industry. Leading call center experts and solution providers explore the most cutting edge technologies and formats transforming the acquisition of Medicare clients and delivering state of the art customer service.

**Moderator:** John Sowell, Head of Medicare Strategic Distribution, Aetna, Franklin, TN  
Ali Hall, Vice President of Sales, AgentCubed a National General Company, Jacksonville, FL  
Ben Henderson, President of Insurance, Clearlink, Salt Lake City, UT  
Dave Rich, CEO & Founder, Ensurem, Clearwater, FL

Crystal Ballroom  
Grand Tower - 20 Fl.

#### 17 - MED SUPP UNDERWRITING - WHY DO YOU ASK THE QUESTIONS YOU ASK?

Experts share their views and contemporary information and research on the perpetual balancing act of pricing, underwriting, and marketability. Taking the right tightrope steps - and deviating from the market where supported by data - may boost your sales AND profitability.

**Moderator:** Nick Ortner, Consulting Actuary, Milliman, Brookfield, WI  
Brian Millman, Vice President, MIB, Inc., Boston, MA  
Rajiv Sood, Vice President and Business Development Leader, Swiss Re, New York, NY

Statler Ballroom  
Grand Tower Lobby

#### 18 - HOW WILL SMALLER & REGIONAL MEDICARE SUPPLEMENT INSURERS SURVIVE?

How do you compete when your competition is bigger, better funded and branded? Competing can feel like a David and Goliath-type scenario. These players share insights that enable them to be successful against even the biggest Med Supp industry giants.

**Moderator:** Dave Peters, VP Sales, Chief Marketing Officer, Medico Insurance Company, Omaha, NE  
Kimberley Madsen, Regional Sales Manager, Springfield, MO  
Ed Porter, President, Secure Marketing Partners, Salt Lake City, UT  
Anne Nizzi-Clark, Vice President, Product & Marketing, American Enterprise, Des Moines, IA

5:15 - 7:00 PM

Landmark 4 - 7

NETWORKING RECEPTION

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Exhibit  
Hall  
Closes  
Today  
at 4:00 PM

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TIME	LOCATION	AGENDA
7:15 AM	Majestic E F G H	<p><b>19 - BREAKFAST</b></p> <p><b>BREAKFAST SPONSORS - SECURE MARKETING PARTNERS and SENTINEL SECURITY LIFE INSURANCE COMPANY</b></p> <p><b>WHEN EVERYTHING IS CHANGING: WHAT'S THAT MEAN FOR THE FUTURE OF MEDIGAP?</b>            Changing consumers, changes to health care, changes to Medicare Advantage, new PPO and EPO options ... what does the future hold and how does an industry position itself for 2020 and beyond. A not-to-miss talk!  <b>John Gorman, Executive Chairman, Gorman Health Group, Washington, D.C.</b></p>
9:00 - 10:15 AM	Majestic A-B-C	<p><b>20 - VALUE ADDED PROGRAMS: COMPARING &amp; EVALUATING COMPETITIVE DIFFERENTIATORS</b>            A panel of dental, vision and hearing benefit direct providers and private label providers explore latest options offered through both Medicare Supplement and Medicare Advantage plans. How to compare and evaluate current or future offerings.</p> <p><b>Moderator:</b> Tom Dimmer, VP, Business Development, Renaissance Life &amp; Health Ins/ Co., Indianapolis, IN            Bryan Derheim, Regional Managing Director, Ameritas, Minneapolis, MN            Teresa Holleman, Sales Director, TruHearing, Salt Lake City, UT            John Laftsidis, Director of Managed Care, HearUSA, Palm Beach Gardens, FL            Jay Rausch, Vice President of Business Dev., Dominion National Inc., Washington, D.C.            Mike Reha, Vice President of Sales and Marketing, Epic Hearing Healthcare, Los Angeles, CA</p>
	Majestic D	<p><b>21 - IS THE PRICE RIGHT? THE 2018 MED SUPP ACTUARIAL PRICING ROUNDTABLE</b>            Leading industry actuaries share their latest insights and information regarding experience analysis and re-pricing, rate management, and the always-challenging balance of increases and regulatory expectations.</p> <p><b>Moderator:</b> Brett Mushett, Consulting Actuary, Allen Bailey &amp; Associates, Inc., Austin, TX            Rob Himmelstein, Actuarial Vice President, Gen Re, Stamford, CT            Kevin Krebs, Vice President, Actuarial, Unified Life Insurance Company, Overland Park, KS</p>
	Majestic H	<p><b>22 - DEBUT OF NEW STUDY FINDINGS: THE ONLINE SHOPPER'S JOURNEY MATTERS</b>            What matters to Med Supp consumers going online for information and quotes? What 'know how' and questions can significantly improve an agent's chances of closing sales. The first time release of Medigap-specific findings derived from millions of shopping behaviors over 30,000 web domains.  <b>Jeff Piotrowski, Senior Director of Insurance, Jornaya, Philadelphia, PA</b></p>
	Landmark 4	<p><b>23 - ADDING LONG-TERM CARE BENEFITS TO MEDIGAP AND MEDICARE ADVANTAGE</b>            The latest updates regarding the efforts to explore alternate ways to finance and deliver traditional 'long-term care' services, as well as ways to integrate home care services in Medicare Supplement and MA plans. Hear directly from experts involved in key initiatives and ample time to ask your questions.</p> <p><b>John Cutler, Consultant to the State of Minnesota, Fairfax, VA</b>  <b>Connie Rogers, Consulting Actuary, United Health Actuarial Services, Belvidere, IL</b>  <b>INVITED: LaRhae Knatterud, Director, Aging Transformation, State of Minnesota, Minneapolis, MN</b></p>

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10:30 - 12:00 PM Majestic A-B-C

**24 - IMPACT OF OMNICHANNEL APPROACH - 25 PERCENT MORE LEADS**

Discover why the nation's most successful marketing organizations are moving from a 'multi-channel' approach to an 'omni-channel' strategy. Hear from top experts marketing insurance and healthcare products and services who'll share strategies and practices that can propel you farther and faster.

**Moderator:** David Schneider, Executive Vice President Sales, Data Decisions Group, Dallas, TX  
 Julie Herbster- VP of Digital Strategy, Quattro Direct, Philadelphia, PA  
 Tom Pitcherella- Managing Director, Quattro Direct, Philadelphia, PA  
 Thomas Scandaliato, Principal, Managing Director NY at Thomas Arts, New York, NY  
 Jordan Yospe, Executive Director, Marketing Technology at Thomas Arts, Salt Lake City, UT

Majestic D

**25 - INNOVATIONS IN INSURANCE UNDERWRITING: NEW TOOLS & DATA**

A look at the latest developments that can help Medicare Supplement insurers make better decisions when reviewing applications. Using behavioral and lifestyle data for more qualitative assessment of an applicant's health risk level.

**Moderator:** Stacy Steuart, Director, Data Strategy and Innovation, Exam One, Lenexa, KS  
 Angela Bolduc, Principal and Director, Milliman IntelliScript, Brookfield, WI  
 Brian Lanzrath, Director of Analytics, Exam One, Lenexa, KS  
 Rich Grisham, AVP of Sales Operations, iPipeline, Exton, PA

Majestic H

**26 - ASK THE REGULATORS: AN OPEN FORUM**

An opportunity to hear from and ask questions of leading State regulators who focus on Medicare insurance products. This is an open forum so come prepared to ask your questions and any from your colleagues unable to attend the conference.

**Moderator:** Heather Jerbi, Exec. Director Product Policy, America's Health Insurance Plans, Wash., D.C.  
 Craig Wright, Deputy Commissioner L&H and Chief Actuary, Florida Office of Insurance Regulation, FL

Landmark 4

**27 - TECH TRENDS: FOR TOMORROW'S MED SUPP AGENTS AND AGENCIES**

Insurance agents and brokers are experiencing a major shift in what their clients have come to expect. Experts discuss and showcase top digital transformational trends and technologies used to be a cut above the rest and distinguish themselves in a crowded insurance marketplace.

**Moderator:** Samuel Halpern, Director of Internet Marketing, Senior Market Sales, Inc., Milwaukee, WI  
 Graham Brown, Vice President Sales & Marketing, EPrintWerx, Scottsdale, AZ  
 Daniel Joye, Founder, Chief Design Officer, Mindfulware, Montgomery, AL  
 Matt Leonard, Director, Medicare Product Management, Omaha, NE

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