

UPDATED April 1, 2019

WEDNESDAY, JUNE 5, 2019

TIME	LOCATION	AGENDA
8:00 AM - 3 PM	Atrium B & C	EXHIBIT HALL OPEN
	Get Details At Event	ATTEND TWO TRACKS OF SESSIONS FOCUSED ON SELLING MEDICARE & SENIOR INSURANCE Track 1: Selling Medicare Insurance Solutions (Medigap, Medicare Advantage, PDP Plans) Track 2: Selling Senior Insurance Products + Lead Generation and Social Media Prospecting See the full program and schedule online at www.medicare supp.org/free
5:15 - 7:00 PM	Atrium Ballroom A	OPENING NETWORKING RECEPTION RECEPTION SPONSOR - USA Senior Care Network



THURSDAY, JUNE 6, 2019

TIME	LOCATION	AGENDA
6:15 AM	Hotel Lobby	GEN RE ANNUAL FUN RUN / WALK Meet in Hotel lobby.
7:00 AM <i>Program begins at 7:30 AM</i>	Atrium Ballroom A	BREAKFAST BREAKFAST SPONSORS - AmeriLife
		 KEYNOTE: A GUIDE TO THRIVING IN A CHANGING WORLD Joseph Jordan, Joe Jordan, New York, NY
9:00 - 10:15 AM	A - 703 - 704	1. TECHNOLOGY SHOWCASE: FOR DISTRIBUTORS AND AGENTS See the latest tech tools created specifically for use by Medicare Supplement distributors and agents. Presenters share their latest innovations and what's coming down the pike. Moderator: Krish Krishnan, President, Magnifact, Chicago, IL Stephen Jass, President, LS Hub, Deerfield Beach, FL Matt Leonard, Director of Product Development, CSG Actuarial, Omaha, NE Tricia Therrien, Vice President of Client Delivery, Connecticut, Raleigh, NC Jonathan Vanderford, Founder, Agent Ally, Louisville, KY
	A - 706 - 707	2. MACRA INSIGHT: HOW WILL THINGS CHANGE OR STAY THE SAME? Where is the industry headed? How will plan marketing focus shift and what are the expected financial implications? Where are new opportunities? What you need to know in order to really be MACRA ready (because it's right around the corner). Moderator: Ken Clark, Principal and Consulting Actuary, Milliman, Chicago, IL Patrick Fleming, Chief Operating Officer, Senior Supplement Insurance, Aetna, Chicago, IL Andrew Ryba, Consulting Actuary, CSG Actuarial, Omaha, NE
	A - 601	3. CONSUMER-FOCUSED MARKETING TRENDS TO GET A LEG UP ON THE COMPETITION What your prospects and customers want, how they think, and how they interact with you and others are all changing - constantly. What marketing trends will take the world by storm next year(s). Now's the perfect time to audit your strategies and start planning for 2020 and beyond. Lindsay Resnick, Executive Vice President, Wunderman Health, Chicago, IL Melissa Price, Head of Marketing Strategy & Analytics, Aetna Senior Supplemental Insurance, Franklin, TN

9:00 - 10:15 AM **A - 602**
Continued from Prior Page

4. ILLUMINATING FINDINGS: HIGHLIGHTS OF THE LATEST MEDIGAP-RELEVANT STUDIES
Hear the main reasons consumers today say they want Med Supp (from Deft Research's latest national consumer study). What the 'right' time to most effectively convert turning 65ers coming from group plans or individual coverage? Discover what the "online tipping point" means.
Tim Brousseau, Vice President Client Services, Deft Research, Minneapolis, MN

10:15 - 10:45 AM **Exhibit Hall**

COFFEE AVAILABLE IN THE EXHIBIT HALL

10:45 - 12:00 PM **A - 703 - 704**

5. FEDERAL UPDATE: LEGISLATIVE & REGULATORY CHANGES & FUTURE LANDSCAPE
The industry-focused 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.
John Greene, VP of Congressional Affairs, National Association of Health Underwriters, Washington, D.C.
Heather Jerbi, Exec. Director Product Policy, America's Health Insurance Plans (AHIP), Washington, D.C.

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6. AUTOMATED UNDERWRITING: A GAME CHANGER FOR MEDIGAP
Automation is revolutionizing insurance. Automated underwriting is a game changer that presents new opportunities, as well as challenges. Experts explore these and more. The latest in analytical tools that help with decision-making.
Moderator: Joseph Iannetti, Underwriting VP & Account Manager, Gen Re, Stamford, CT
Scott Collier, Pharm. D., Product Manager, Medical Data, Milliman IntelliScript, Brookfield, WI
Paul Higgins, M.D., Medical Vice President, Gen Re, Stamford, CT
Brian Hess, Chief Operating Officer, Ebbie, Olathe, KS

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7. AGING STRONG: SUPPORTING SUCCESSFUL AGING AMONG OLDER ADULTS
As the population of older adults in the US continues to grow, resources and solutions are needed to help them age successfully with optimal outcomes. In this session, hear from UnitedHealthcare and AARP Services, Inc. panelists as they describe the groundbreaking research and innovative initiatives they have taken on to improve the lives of the Medicare population. Urgent issues and the strategies to address the key social determinants of health.
Doug Armstrong, Vice President, Health Products, AARP Services, Inc., Washington D.C.
James Schaeffer, Vice President, Health Care Informatics, Optum, Eden Prairie, MN

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8. TECH TOOLS & COMMUNICATION STRATEGIES TO GAIN THE GREATEST RESULTS
What is proving to be the most effective consumer communication strategies and technology being used by Med Supp insurers, distributors and agents to generate cost-effective results? From E-mail marketing, to CRM systems to Social Media - our panel of experts take a deep dive into how strategy and technology come together.
Dvora Ivankowski, Co-Founder, AgentMethods, LLC., Asheville, NC
Ali Hall, Vice President, Sales, AgentCubed, Jacksonville, FL

12:00 PM **Atrium Ballroom A**

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KEYNOTE: D.C. UPDATE: MEDICARE FOR ALL ??? MA FOR MORE ??? WHAT'S IN STORE?
Robert Blancato, President, Matz, Blancato and Associates, Washington D.C.

2:00 - 3:15 PM **A - 703 - 704**

9. STATE LEGISLATIVE UPDATE: LATEST NAIC AND STATE INITIATIVES
What's going on across the nation that is relevant to those targeting Medicare eligibles (seniors) -- including the latest from the Spring NAIC Conference. Plus updates on MARCA and senior-focused initiatives including short-term and long-term care models. The latest information from a panel of national experts.
Susan Voss, Vice President, Government Relations, American Enterprise Company, Des Moines, IA.
Heather Jerbi, Exec. Director Product Policy, America's Health Insurance Plans (AHIP), Washington, D.C.
Dan MacLauchlan, Senior Director, Compliance and Regulatory, UnitedHealth Group, Horsham, PA
David Torian, Counsel & Health Policy Analyst, Ntl. Assoc. of Insurance Commissioners, Washington D.C.

2:00 - 3:15 PM

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10. FUTURE OF MED SUPP DISTRIBUTION: WAYS TO FUTURE PROOF YOUR BUSINESS

What is the future trajectory of Medigap insurance distribution? What's the impact of digital and technology transformation on the traditional insurance business model? Will smaller distributors survive? What can make your producers 'sticky' (loyal to your agency)?

Moderator: Mike Vietri, Chief Distribution and Marketing Officer, AmeriLife, Clearwater, FL
 Sylvia Gordon, President, Gordon Marketing, Noblesville, IN
 Bob Grant, Chief Revenue Officer, SelectQuote, Overland Park, KS
 Steve Patton, VP, External Distribution, Aetna Supplemental Benefits, Nashville, TN
 Derek Richardson, President, Life and Health Distribution, AmeriLife, Clearwater, FL

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11. MAXIMIZING RESULTS FROM AN IN-HOUSE OR OUTSOURCED CALL CENTER

Call centers are now an integral fixture in Medicare insurance sales - and poised for continued growth. Best tips for getting started - or - improving your current call center's results. What are strategies to drive more consumers and the key metrics that can help you monitor and analyze overall efficiency, performance and competency.

Moderator: Kris Schneider, Vice President, Consumer & Carrier Engagement, Aon, Lincolnshire, IL
 Kortney Cruz, Director of Sales and Marketing, Independence Blue Cross, Philadelphia, PA
 Daniel Greeson, CEO, Equoto, Atlanta, GA

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12. MED SUPP UNDERWRITING AND INNOVATION

The role and execution of underwriting in the context of broader emerging insurance and distribution trends. Expect 'innovation' and 'disruption' to be at the forefront of the discussion. These leading practitioners will assess the landscape and their talk from a year ago and look at what's to come.

Moderator: Nick Ortner, Consulting Actuary, Milliman, Brookfield, WI
 Roy Hobbs, Underwriting Supervisor, Bankers Fidelity Life Insurance Company, Atlanta, GA
 Brian Millman, Vice President, MIB, Inc., Boston, MA
 Rajiv Sood, New York, NY

3:15 - 3:45 PM

Exhibit Hall

COFFEE AVAILABLE IN THE EXHIBIT HALL

3:45 - 5:00 PM

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13. THE 2019 MEDICARE SUPPLEMENT CEO ROUNDTABLE & OPEN FORUM

Esteemed industry leaders examine the state of the Med Supp business today and share points of view about the future. Our annual CEO open forum is always packed so come early and prepared to ask your questions.

Moderator: Steve Najjar, Executive Vice President, Hannover Re, Orlando, FL
 Bryan Adams, CEO, Integrity Marketing Group, Dallas, TX
 Scott Perry, CEO, AmeriLife Group LLC, Clearwater, FL
 Ty Wooldridge, President, Aetna Senior Supplemental Insurance, Franklin, TN

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14. IS SENIOR DENTAL THE NEXT BIG OPPORTUNITY FOR INSURERS & DISTRIBUTORS?

Only 40% of seniors have dental insurance. With the number of adults aged 65+ growing to 68 million over the next 10 years, the numbers suggest that this is a significant opportunity. Hear the latest findings of a CSG Actuarial study of the individual dental market as well as from companies and distributors already focused on dental coverage.

Moderator: Brenton Pyle, Consulting Actuary, CSG Actuarial, Omaha, NE
 Hunt Bascom, Vice President, SmartMatch Insurance Solutions, Kansas City, MO
 Bryan Derheim, Regional Marketing Director, Ameritas, Minnetonka, MN
 Carrie Haubensak, Sales Director, Medico Insurance Company, Omaha, NE
 Kyal Moody, Senior Vice President, HealthCompare, Orange County, CA
 Scott Root, Product Management / Development Manager, Aetna, Franklin, TN

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15. HOT TOPICS: BIG DATA - BIG ISSUES - THE MEDIGAP ACTUARIAL ROUNDTABLE

Leading industry actuaries explore a range of timely big issues. Some controversial (MACRA Point - Counterpoint). Some looking ahead (Will there be a New Plan G?). Some topics Medigap actuaries are monitoring (Drugs and Medigap plans). Plus, the chance to get your questions answered.

Moderator: Denis Tauscheck, Chief Actuary and Revenue Officer, Integrity Marketing Group, Dallas, TX
 Bryan Griffith, Executive Director, Actuary, Aetna Senior Supplemental Insurance, Nashville, TN
 Constance Rogers, Consulting Actuary, United Health Actuarial Services, Inc., Carmel IN
 Charlie Thalheimer, EVP and Corporate Actuary, AmeriLife Group, Clearwater, FL

3:45 - 5:00 PM **A - 602**

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16. DIGITAL MARKETING THAT ACCELERATES MEDIGAP LEADS AND DRIVES SALES

Everything you did with direct mail can now be done with digital campaigns. Experts driving Medigap and senior campaigns share the latest on Social Media (Facebook campaigns), Email design, code optimization and wave management, using QR codes and more.

Moderator: Bob Donnellan, Vice President of Sales and Marketing, RGI Data Assets, Atlanta, GA
 Richard Bufkin, President, Target Leads, Rockwall, TX
 Rick Wilson, List Portal Director, Giant Partners, Thousand Oaks, CA

5:15 - 7:00 PM **Atrium Ballroom A**

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FRIDAY, JUNE 7, 2019

Exhibit Hall Remains Open Until 11:00 AM Today

TIME LOCATION AGENDA

7:15 AM **Atrium Ballroom A** **BREAKFAST**
BREAKFAST SPONSORS - AVAILABLE

Program begins at 7:45

HOW TO POSITION MED SUPP FOR THE COMING MEDICARE ADVANTAGE CHALLENGE
 Jim Yocum, Senior Vice President, Federal Programs, Connecticut, Columbia, MD

9:00 - 10:15 AM **A - 703 - 704**

17. HOW CAN TRADITIONAL DISTRIBUTORS COMPETE (SURVIVE) GOING FORWARD

Amazon and E-commerce changed the world. Changes are already impacting traditional Marketing Agencies (GAs/FMOs). Will E-FMOs dominate the future? Hear heads of small and regional distributors PLUS future-forward independent thought leaders. Let's start this important discussion about the future.

Moderator: Jesse Slome, Director, American Association for Medicare Supplement Ins., Westlake, CA
FMO: Mike Smith, President, The Brokerage, Inc., Dallas, TX
FMO: Angela Palo, Executive Vice President, PFS Financial, Warminster, PA
FMO: Brian Garity, President, GarityAdvantage Insurance Marketing Agencies, Boston, MA
FUTURIST: Lindsay Resnick, Executive Vice President, Wunderman Health, Chicago, IL
FUTURIST: Marty Martin, Executive Vice President, Liberty Bankers Life, Dallas, TX
FUTURIST: Joe Boutin, Founder and CEO, 321 The Agency, Orlando, FL

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18. REALITIES OF CROSS-SELLING: WHAT REALLY MAKES FOR SUCCESSFUL EFFORTS?

There are expectations, and then there are realities. A panel explores and shares what is the secret sauce to achieving cross-selling with Medicare-focused producers as well as across product lines. Strategies, system requirements and timing for across the table and over the phone efforts.

Moderator: Steven Prince, Vice President, Marketing, Integrity Marketing, Dallas, TX
 Dan Mangus, Vice President of Sales, Senior Marketing Specialists, Columbia, MO
 Jeremy Smith, Business Development Manager, Western Marketing, Missouri Valley, IA

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19. MEDICARE SUPPLEMENT CLAIMS MANAGEMENT: IT'S BECOME MEANINGFUL

Hear why the old way of thinking (if Medicare pays, we pay) can be the difference between profit and loss on your Medigap business. From combating evolving fraud schemes to negotiating large claims, leading claims experts share claims management insights and strategies you shouldn't overlook.

Moderator: Patricia Bailer Vice President, Head of Claims, Gen Re, S. Portland, ME
 Adam Love, Investigative Consultant & Client Manager, Summit Investigations, Weymouth, MA
 Russell Workman, Director of Claims, Aetna Senior Supplemental Insurance, Nashville, TN

9:00 - 10:15 AM

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*Continued from prior page***20. RETIRED AND WIRED: ARE YOU READY FOR TECH-SAVVY SENIORS?**

As digital technology adoption continues to trend upwards, is the way you communicate with the retiree population outdated? What are distinctions in tech adoption and use patterns by those 65+? What have proven to be best strategies for retiree engagement and communication?

Pat Yu, Product Development Director, Aon, Oregon City, OR

John Dunbar, VP, Chief Information Officer, Bankers Fidelity Life Insurance Company, Atlanta, GA

10:30 - 12:00 PM

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21. SECRET TO A SUCCESSFUL ENROLLMENT TECHNOLOGY ROLLOUT

Vital dos and don'ts for distributors looking to implement and roll out enrollment technology for use by agents. What's the best time to implement a new initiative? Learn from successful implementations and hear how to avoid mistakes that cost time and will frustrate your producers.

Moderator: Susan Plumer, Vice President of Sales, Connecture, Chicago, IL

Sam Halpern, Director of Internet Marketing, Senior Market Sales, Milwaukee, WI

Jill Henderson, COO, Neishloss & Fleming, an Integrity Marketing Group Company, Pittsburgh, PA

John Jevin, Senior Director, Technology, Aetna Senior Supplemental Insurance, Franklin, TN

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22. HOW ANCILLARY BENEFITS INCREASE MEDICARE MEMBER ENGAGEMENT

Untreated hearing loss results in 50 percent more hospital stays. Just one slice of latest study data that will explain the importance of ancillary benefits to controlling healthcare costs, improving member wellness and satisfaction. Latest strategies to integrate ancillary benefits with a wellness strategy for Medicare members.

Mike Reha, Vice President, Sales and Marketing, Epic Hearing, Los Angeles, CA

Tom Dimmer, Vice President, Individual Markets, Renaissance Life & Health Insurance, Salt Lake City, UT

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23. ASK THE REGULATORS: AN OPEN FORUM

An opportunity to hear from and ask questions of 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.

David Torian, Counsel & Health Policy Analyst, Ntl. Assoc. of Insurance Commissioners, Washington D.C.

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24. STAYING COMPETITIVE WITH BEHAVIORAL DATA: BEST STRATEGIES FOR INSURERS

Gaining a clear view of customers and their preferences will elevate results. Discover how behavioral data is helping carriers improve the customer experience and conversion rates. Best strategies to incorporate data to create more sophisticated and individualized interactions.

Jeff Piotrowski, Senior Director of Insurance, Jornaya, Philadelphia, PA

This concludes our conference program.

Thank you for attending.