

NATIONAL MEDICARE & SENIOR INSURANCE PRODUCTS SALES SUMMIT

JUNE 5, 2019

Marriott Marquis Hotel, Atlanta, GA

Selling Medicare Insurance Solutions IMPERIAL SALON A

TIME	SESSION TITLE & DISTINGUISHED PRESENTER
8:00 AM	TOP 5 SECRETS OF SELLING MEDICARE & OTHER SENIOR INSURANCE PRODUCTS OVER THE PHONE Gary Prado, CEO, SalesDialers.com
8:30	MARKET OVERVIEW: THE LATEST DATA FOR MED SUPP AND MEDADVANTAGE SALES - TRENDS - FORECASTS Jared Strock, Consulting Actuary, CSG Actuarial
9:00	WHERE MEDICARE ADVANTAGE IS HEADING - LATEST BENEFITS FOR YOU AND YOUR SALES Bob Brzyski, VP, Marketing, Pinnacle Financial Services
9:30	SMALL GROUPS: GENERATING BIG MEDIGAP BUSINESS BY WORKING THE SMALL GROUP MARKETPLACE Martina Wiedmayer, VP - Sales, Group, UnitedHealth Group
10:00	HOW TO REALLY MAKE MONEY (LIKE \$15,000 a year) SELLING PART D PRESCRIPTION DRUG PLANS Jerold Johnson, President, National Contracting Center
10:30	THE BETTER TARGET MARKET: SUCCESSFULLY SELL MEDICARE SUPPLEMENT TO CONSUMERS 70 AND OLDER Devin Rubin, Managing Dir., Golden Years Design Benefits
11:00	HIGH DEDUCTIBLE PLAN F: THE MOST MISUNDERSTOOD MEDIGAP PLAN Tom Hall, Dir. of Sales, United American/Globe Life of NY
11:30	STRATEGIES FOR A PROFITABLE MEDICARE BUSINESS, MAXIMIZE PROFITS, PROTECT FROM EARLY DEATH Keith Nabb, Founder & Principal, Affordable Medicare Solutions
1:00 PM	STRATEGIES SHARED BY OUR TOP MEDIGAP PRODUCERS; LEAD GEN, SALES STRATEGIES, REFERRALS & MORE Ryan Kimble, President, Agent Pipeline, Inc.
1:30	LEGISLATIVE UPDATE FOR MEDICARE INSURANCE PRODUCERS - FEDERAL & STATE INITIATIVES & ISSUES John Greene, VP Cong. Affairs, Ntl. Assoc of Health Underwriters
2:10	MED SUPP SALES LEADING PRODUCER ROUNDTABLE: - HEAR FROM OUR PANEL OF TOP MEDIGAP AGENTS - Leading producers who each sell numerous Medigap policies yearly, share how they get more prospects and the tips and tactics that make them THE BEST OF THE BEST. Plus, ample time to get your questions answered. Panel Moderator: Jesse Slome, Director, American Association for Medicare Supplement Insurance

Senior Insurance Products / Lead Generation IMPERIAL SALON B

TIME	SESSION TITLE & DISTINGUISHED PRESENTER
8:00 AM	THE OVERLOOKED SALES OPPORTUNITY: SHORT-TERM CARE - FOR SENIORS WHO CAN'T AFFORD OR QUALIFY FOR LTC Dave Peters, Vice President of Sales, Medico
8:30	5 NEW LTC SOLUTIONS YOU'VE NEVER THOUGHT ABOUT; NEW PRODUCTS - NEW OPTIONS NOW AVAILABLE Bill Jones, President, National Alliance of Insurance Agencies
9:00	DO YOU HAVE THE STRUCTURE TO BE SUCCESSFUL SELLING MEDICARE & SENIOR INSURANCE SOLUTIONS Chris Weir, Owner, Lead Concepts
9:30	THE 4 THINGS SENIORS ARE CONCERNED ABOUT - AND THE SCRIPTS THAT PULL THEM IN Lloyd Lofton, CEO, Power Behind The Sales
10:00	THE NEW LTC TALK: HOW TO SUCCESSFULLY TALK & SELL THE NEW LONG-TERM CARE SOLUTIONS Angie Hughes, LTC Marketing Director, ProducersXL
10:30	POSITIONING CANCER PLANS: HOW TO EASILY INCLUDE THEM IN YOUR PRODUCT PORTFOLIO Michael Prothe, Sales Director, Mutual of Omaha
11:00	DENTAL INSURANCE: EASY WAYS TO TAKE A BITE OUT OF THIS LUCRATIVE SENIOR MARKET Bryan Derheim, Regional Managing Director, Ameritas
11:30	AN EASY WAY TO BRING VALUE AND GENERATE RECURRING REVENUE BY PROMOTING VISION PLAN COVERAGE TO SENIORS Sharon Alford, VP Business Development, VSP Vision Care
12:00	SELLING HOME HEALTH CARE - PEACE OF MIND STARTS HERE Jack Broughton, Vice President, Kemper Health
1:00 PM	AN AGENT'S GUIDE TO USING SOCIAL MEDIA TO GENERATE MORE CONNECTIONS THAT LEAD TO MORE SALES Dvora Ivankowski, Branding Strategist, Agent Methods
1:30	TURNING UNNEEDED LIFE INSURANCE INTO TAX-FREE FUNDS FOR LONG-TERM CARE Chris Orestis, Executive Vice President, GWG Life
2:00	HOW TO ORDER LEADS FOR MEDICARE AND AEP: MAXIMIZING RESPONSE & MINIMIZING COST Michelle Bardin, Sales Manager, Target Leads
2:30	MULTI-TOUCH CAMPAIGNS ARE MORE EFFECTIVE: HOW TO SUCCESSFULLY IMPLEMENT ONE Chris York, Senior VP, Dialog Direct - Kramer Direct

**THE FREE PROGRAM & YOUR EXHIBIT HALL ACCESS
ENDS AT 3:00 PM**

2019 MEDICARE SUPPLEMENT INSURANCE SUMMIT

CONFERENCE PROGRAM

WEDNESDAY, JUNE 5, 2019

TIME	LOCATION	AGENDA
8:00 AM - 3 PM	Atrium B & C	EXHIBIT HALL OPEN
	Imperial A & B	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
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 TO BENEFIT KATE'S CLUB Meet in Lobby. Donations to this local charity are welcome.
7:00 AM <i>Program begins at 7:30 AM</i>	Atrium Ballroom A	BREAKFAST BREAKFAST SPONSOR - 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, Connecture, 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, Executive Vice President Product Innovation & Corp Actuary, AmeriLife, Clearwater, FL 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
	A - 602	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. Moderator: Lisa Zamosky, Senior Director, Communications, eHealth, Inc., Santa Clara, CA Tim Brousseau, Vice President Client Services, Deft Research, Minneapolis, MN Kevin Walbrick, Co-President, GM, GoMedigap, an eHealth co., Austin, TX



2019 MEDICARE SUPPLEMENT INDUSTRY SUMMIT

THURSDAY, JUNE 6, 2019

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.

A - 706 - 707

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, VP & Chief Underwriter, Group & Specialty Products, Gen Re, Stamford, CT
Scott Collier, Pharm. D., Product Manager, Medical Data, Milliman IntelliScript, Brookfield, WI
Brian Hess, Chief Operating Officer, Ebbie, Olathe, KS
Paul Higgins, M.D., Medical Vice President, Gen Re, Stamford, CT

A - 601

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

A - 602

8. TECH TOOLS & COMMUNICATION STRATEGIES TO GAIN THE GREATEST RESULTS

What is proving to be the most effective lead conversion and client retention strategies as it relates to personalized communication and CRM technology for both the agent and the carrier? Our 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



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2019 MEDICARE SUPPLEMENT INDUSTRY SUMMIT

THURSDAY, JUNE 6, 2019

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.
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.

A - 706 - 707

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

A - 601

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
Daniel Greeson, CEO, Equoto, Atlanta, GA

A - 602

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

3:15 - 3:45 PM

Exhibit Hall

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2018 National Medicare Supplement Industry Summit	2017 National Medicare Supplement Industry Summit	2016 National Medicare Supplement Industry Summit
June 12-14, 2018 - St. Louis, MO	April 12-15, 2017 - Dallas, TX	April 26-27, 2016 - Kansas City, MO
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3:45 - 5:00 PM

A - 703 - 704

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

A - 706 - 707

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
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

A - 601

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

A - 602

16. DIGITAL MARKETING THAT ACCELERATES MEDIGAP LEADS AND DRIVES SALES

Are you marketing on Facebook? How about via E-Mail? If not, you should be! Over 60% of people in the boomer population are now on at least one social media site – in fact, they make up over 10% of active Facebook users. Understand how digital leads are becoming increasingly popular in our industry

Moderator: Bob Donnellan, Vice President of Sales and Marketing, RGI Data Assets, Atlanta, GA
Angela Palo, Executive Vice President, Pinnacle Financial Services, Warminster, PA
Rick Wilson, List Portal Director, Giant Partners, Thousand Oaks, CA

5:15 - 7:00 PM

Atrium Ballroom A

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FRIDAY @ 11:00 AM**

TIME LOCATION AGENDA

7:15 AM

Atrium Ballroom A

BREAKFAST

Program begins at 7:45

BREAKFAST SPONSOR - Liberty Bankers Life



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, Pinnacle Financial Services, 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

A - 706 - 707

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

A - 601

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

Eric Johansson, Chief Operations Officer, Liberty Bankers Insurance Group, Dallas, TX

Jason Gallant, National Director, Claims Bureau USA, Atlanta, GA

A - 602

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?

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

Brian Edenfield, Director, Consumer Engagement, Aon, San Antonio, TX

Exhibit Hall Remains Open Until 11:00 AM Today

Your feedback is appreciated



I welcome your feedback and suggestions for continued improvement. Please email them to me, jslome@medicaresupp.org



Access the Conference Program & Schedule

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