

**WEDNESDAY, MAY 13, 2020**

TIME	LOCATION	AGENDA
8:00 AM - 3 PM	Discovery Hall	EXHIBIT HALL OPEN
	Schaumburg EAST Ballroom WEST Ballroom	ATTEND TWO TRACKS OF SESSIONS FOCUSED ON SELLING MEDICARE & SENIOR INSURANCE <b>Track 1:</b> Selling Medicare Insurance Solutions (Medigap, Medicare Advantage, PDP Plans) <b>Track 2:</b> Selling Senior Insurance Products + Lead Generation Prospecting
5:15 - 7:00 PM	Nirvana Ballroom	OPENING NETWORKING RECEPTION <b>RECEPTION SPONSOR - USA Senior Care Network</b>

**THURSDAY, MAY 14, 2020**

TIME	LOCATION	AGENDA
7:00 AM <i>Program begins at 7:30 AM</i>	Adventure Hall	BREAKFAST <b>BREAKFAST SPONSOR - AmeriLife</b>
		<b>AMERILIFE</b>  KEYNOTE: WASHINGTON D.C., - THE WORLD OF THE UNKNOWN Pre-election outlook for 2020 and beyond for Medicare, Medicare plans and senior issues. Robert Blancato, President, Matz Blancato & Associates, Washington, D.C.
9:00 - 10:15 AM	Schaumburg East	<b>1. FIRST LOOK POST MACRA: EXPECTATIONS VERSUS EARLY REALIZATIONS</b> It's still early but how do pre-MACRA speculations compare with what has happened to date? Have any outlooks changed and how will that impact loss ratios, plan enrollment and other important factors. <b>Session Director:</b> Simon Tang, Senior VP, Health Pricing Actuary, iptiQ Americas L&H, Armonk, NY Ken Clark, Principal and Consulting Actuary, Milliman, Chicago, IL Tim Bulat, Chief Actuary, Cigna Supplemental Benefits, Philadelphia, PA Patrick Fleming, EVP Product Innovation & Corporate Actuary, AmeriLife, Clearwater, FL Denis Tauscheck, Chief Actuary and Revenue Officer, Integrity Marketing Group, Dallas, TX
	Schaumburg West	<b>2. TECHNOLOGY SHOWCASE: FOR DISTRIBUTORS AND AGENTS</b> 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. <b>Session Director:</b> John Jevin, Senior Director, Aetna Medicare IT Delivery, Franklin, TN Kris Schneider, Senior Vice President, Datalot, Brooklyn, NY Aaron Kassover, Founder, AgentMethods, Seattle, WA Krish Krishnan, President, Magnifact, Chicago, IL Brien Welch, Sales Director, CSG Actuarial, Omaha, NE Jeff Blatner, Senior Vice President, Innovation and Product Strategy, Connecture Gus Smith, Community Lead/Business Development, Trusty.care, New York, NY
	Schaumburg ABCD	<b>3. NEW DIRECTIONS FOR LEAD GENERATION IN THE MED SUPP SPACE</b> What worked last year is already old news. What are the latest digital strategies for generating Medigap leads economically and ensuring that sales leads don't inhibit your growth? What lead gen trends and changes do experts see on the horizon? <b>Session Director:</b> Bob Donnellan, Vice President, Sales and Marketing, RGI Data Assets, Atlanta, GA Danny Gleeson, Founder, Equoto, Atlanta, GA Andrew Taylor, Vice President, Family First Life, Las Vegas, NV Kevin Tomlinson, President, MSIS, Inc., Valdosta, GA Scott Williams, Senior Vice President of Medicare Supplements, Liberty Bankers Life, Chicago, IL
	Schaumburg EFGH	<b>4. BEHAVIORAL SCIENCE'S IMPACT ON MEDIGAP PRODUCT DEVELOPMENT / MARKETING</b> Companies are increasingly recognizing the value of placing behavioral science—the blend of insights from psychology, economics and neuroscience—as a part of their product and sales development. Methodologies for leveraging behavioral science in developing insurance products and marketing to consumers. <b>Session Director:</b> Niels Keuker, Chief Marketing & Sales Officer, iptiQ Americas, Armonk, NY Jeff Piotrowski, Senior Director of Insurance, Jornaya, Philadelphia, PA

10:15 - 10:45 AM	Exhibit Hall	COFFEE AVAILABLE IN THE EXHIBIT HALL	
10:45 - 12:00 PM	Schaumburg East	<p><b>5. 2020 FEDERAL UPDATE: LEGISLATIVE &amp; REGULATORY CHANGES &amp; FUTURE LANDSCAPE</b> The yearly briefing by leading experts. Changes that have or will impact Medicare, Medigap and MA plans. Plus, your opportunity to ask questions and hear those raised by your peers from across the industry.</p> <p><b>Robert Blancato, President, Matz Blancato &amp; Associates, Washington, D.C.</b> <b>Heather Jerbi, Executive Director, Product Policy, America's Health Insurance Plans, Washington, D.C.</b> <b>David Torian, Counsel &amp; Health Policy Analyst, Ntl. Assoc. of Insurance Commissioners, Washington, D.C.</b></p>	
	Schaumburg West	<p><b>6. LEAD GENERATION SHOWCASE: FOR DISTRIBUTORS AND AGENTS</b> <b>THE</b> Medigap industry's leading generators of leads showcase what's working to generate quality new prospects. Your chance to see it all compared in one place at one time.</p> <p><b>Session Director: Richard Bufkin, President, Target Leads / Senior Direct, Monterey, CA</b> <b>Benepath - Clelland Green, President, Netwon Square, PA</b> <b>Dialog Direct - Chris York, Senior Vice President, Highland Park, MI</b> <b>Giant Partners - Rick Wilson, List Portal Director, Thousand Oaks, CA</b> <b>Lead Concepts - Chris Weir, President, Irving, TX</b> <b>Sales Data Pro - Brian Ebersole, Partner, Lake Forest, CA</b></p>	
	Schaumburg ABCD	<p><b>7. LATEST LOOK AT MEDICAL TRENDS AND LOSS RATIOS IMPACTING MEDIGAP</b> Examining the latest data to examine how insurers are impacted and responding to recent changes. Exploring the difference of opinions regarding rate increases and what may be in store for Medigap insurers.</p> <p><b>Session Director: Andy Baillargeon, Life/Health Chief Specialty Pricing Officer, Gen Re, Portland, ME</b> <b>Brett Mushett, Senior Consulting Actuary, Allen Bailey &amp; Associates, Austin, TX</b></p>	
12:00 PM	Adventure Hall	<p><b>NETWORKING LUNCHEON</b> <b>LUNCHEON SPONSOR - CareValue</b></p> <p><b>THE 2020 MEDIGAP INSURER LEADERSHIP PANEL</b></p> <p>Your chance to question the heads of Medigap insurers (and to hear their answers to what others want to know). <b>Aetna Senior Supplemental Insurance - Ty Wooldridge, President, Franklin, TN</b> <b>Bankers Fidelity Life Insurance Company - Rick Burns, Executive Vice President, Atlanta, GA</b> <b>Liberty Bankers Insurance Group, Marty Martin, Executive Vice President, Chief Marketing Officer, Dallas, TX</b> <b>United HealthCare - Joe Hefermann, President, Insurance Solutions, UnitedHealthcare Group, Minneapolis, MN</b></p>	
2:00 - 3:15 PM	Schaumburg East	<p><b>9. 2020 STATE LEGISLATIVE UPDATE: LATEST NAIC AND STATE INITIATIVES</b> What's going on at the State level that is timely and relevant to those targeting Medicare eligibles (seniors) -- including the latest from the latest NAIC Conference.</p> <p><b>Heather Jerbi, Executive Director, Product Policy, America's Health Insurance Plans, Washington, D.C.</b> <b>Greg Martino, Assistant Vice President, State Government Affairs, Aetna, Harrisburg, PA</b> <b>David Torian, Counsel &amp; Health Policy Analyst, Ntl. Assoc. of Insurance Commissioners, Washington D.C.</b></p>	
	Schaumburg West	<p><b>10. 2020 NATIONAL MEDICARE CONSUMER STUDY: MEDIGAP SHOPPING &amp; ENROLLMENT</b> Findings of two major post-2019 AEP studies of Medicare insurance buying decisions. Latest data on how Medicare buyers at different ages shop. Understand what's working to best capture buyers, ways to convert current policyholders and successful strategies to retain and expand your business.</p> <p><b>Session Director: Susan Plumer, Vice President, Sales, Connecture, Chicago, IL</b> <b>George Dippel, Senior Vice President, Client Services, Deft Research, Chicago, IL</b> <b>Bill Keyes, Senior Sales and Marketing Leader, Connecture, St. Petersburg, FL</b></p>	

- Thursday program continues on the next page -

2:00 - 3:15 PM

*continued***Schaumburg ABCD****11. DIGITAL MARKETING: SUCCESS STRATEGIES FOR TURNING ONLINE CLICKS INTO SALES**

If you are doing (or considering) online marketing, see how industry leaders are successfully turning web and social media online clicks into a 1-call transfer sale for agents.

**Session Director:** Kris Schneider, Senior Vice President, Datalot, Brooklyn, NY

**Schaumburg EFGH****12. NO REALLY, MEDIGAP UNDERWRITING IS CHANGING**

An examination of the latest changes that impact present insurers and those in the product development stage. Technology, underwriting tools, behavioral science's role in application design, and latest in medical claims data all will be discussed by our panel of leading experts.

**Session Director:** Joseph Iannetti, VP & Chief Underwriter, Group & Specialty Prods, Gen Re, Stamford, CT  
Scott Colier, Pharm. D., Product Manager, Medical Data, Milliman Intelliscript, Brookfield, WI  
Cecil Ramotar, Underwriting VP, Individual Life & Medicare Supplement Underwriting, GenRe, Stamford, CT

3:15 - 3:45 PM

**Exhibit Hall****COFFEE AVAILABLE IN THE EXHIBIT HALL**

3:45 - 5:00 PM

**Schaumburg East****13. GLOBAL MEGA TRENDS IMPACTING MEDICARE SUPPLEMENT: 2020 - 2025**

We live in an era of disruption and transformation that impact all aspects of business. Industry leaders discuss trends, challenges and opportunities, plus what they are doing to navigate these times to ensure future success.

**Session Director:** Steve Woods, Vice President, Gen Re - A Berkshire Hathaway Company, S. Portland, ME  
Denis Tauscheck, Chief Actuary and Revenue Officer, Integrity Marketing Group, Dallas, TX

**Schaumburg West****14. DIRECT TO CONSUMER: GROWTH CHANNEL OF THE FUTURE**

D-2-C marketing is a significant part of overall Medicare sales and growing within the Medigap space particularly as digitally savvy boomers turn 65. Experts in lead gen from broadcast to print and call center tech share what's working to get millions of consumers to enroll directly electronically or over the phone.

**Session Director:** Lindsay Resnick, Executive Vice President, Wunderman Health, Chicago, IL  
Margaret Mood, Sales Director, Senior Markets, Harvard Pilgrim Health Care, Wellesley, MA  
Bill Stapleton, Chief Executive Officer, HPOne, Trumbull, CT  
Gaurav Suri, President, Chief Business Officer and Co-Founder, HealthIQ, Mountain View, CA

**Schaumburg ABCD****15. A FEW MILLION HERE - A FEW MILLION THERE: LATEST ON MEDIGAP CLAIMS INTEGRITY**

Hear the findings of an inter-carrier initiative (started after last year's Summit) that is already recapturing lost money. What practices are resulting in the greatest claims-related savings? From overpayments to underwriting our panel of experts will make this session well worth your time!

**Session Director:** Jim Del Vecchio, President, Asset Protection Unit, Inc., Amarillo, TX  
Anithra Rao, M.D., CEO, Neurocern, Chicago, IL

**Schaumburg EFGH****16. THE EVER-CHANGING CUSTOMER EXPERIENCE: KEEPING UP - STAYING AHEAD**

Change is the only constant. What does a good customer experience look like in a world of rapidly moving expectations? What do Medigap customers, their caregiving advocates and agents want and need today? What's on the drawing table to serve them all and stay ahead?

**Session Director:** Melissa Price, Manager, Customer Experience & Loyalty, Aetna Senior Supplemental, TN  
Graham Smith, Vice President, Brokerage Division, United Insurance Group Agency, Inc., Milford, MI

5:15 - 7:00 PM

**Exhibit Hall****NETWORKING RECEPTION - There are 124 Exhibit Booths! Visit Them All !****RECEPTION SPONSOR (AVAILABLE)**

*Exhibit Hall Remains Open Until 11:00 AM Today*

**FRIDAY, MAY 15, 2020**

TIME	LOCATION	AGENDA
7:15 AM <i>Program begins at 7:45</i>	Discovery Hall	<p><b>BREAKFAST</b></p> <p><b>BREAKFAST SPONSOR (AVAILABLE)</b></p> <p><b>KEYNOTE: TELEHEALTH TRENDS AND OPPORTUNITIES IN THE MEDIGAP INDUSTRY</b> Trends in the use of telehealth by seniors and how CMS 2020 changes will likely impact MA plans and inevitably Medigap. <b>John Korangy, MD, MPH, Founder and CEO, CareClix, Washington, D.C.</b></p>
9:00 - 10:15 AM	Schaumburg East	<p><b>17. GROWING SALES! BEST TACTICS TO BUILD AGENCY OR PERSONAL SALES INTO 2025</b> Where you'll be in 2025 depends on what you start to do now. We've gathered industry leading sales pros from small, medium and large agencies to share what they see as the greatest opportunities for agencies and individual producers who sell Medicare insurance solutions.</p> <p><b>Session Director:</b> Scotty Elliott, Vice President, AmeriLife Group, LLC, Clearwater, FL Brent Ehlers, Vice President, Sales and Marketing, Premier Marketing, Norfolk, NE Ryan Kimble, President, Agent Pipeline, Inc., St. Albans, WV Angela Palo, Executive Vice President, Pinnacle Financial Services, Jamison, PA Sean Pekarsky, Associate Director, Medicare Solutions, Senior Market Sales, Omaha, NE Jeremie Pielemeier, Vice President, Eldercare Insurance Services, Hot Springs, AR Mike Smith, President, The Brokerage, Inc., Dallas, TX Kris Wasney, Sales Director, CareValue, Canandaigua, NY</p>
	Schaumburg West	<p><b>18. INNOVATION IN INSURANCE; WHAT'S APPLICABLE TO MED SUPP 2021 &amp; MED SUPP 2025</b> Transformational technology and consumer changes and innovations are changing the wider insurance marketplace. Med Supp 2021 is right around the corner and Med Supp 2025 isn't that far off. Who is driving the changes? What changes may be applicable and when might we see them?</p> <p><b>Session Director:</b> Nick Ortner, Consulting Actuary, Milliman, Milwaukee, WI</p>
	Schaumburg ABCD	<p><b>19. ADMINISTRATIVE / CLAIMS ISSUES &amp; OPPORTUNITIES FOR MED SUPP CARRIERS</b> Here's where the rubber really meets the road. Our panel of experts will explore the latest in robotic processing, newest findings uncovered by special investigation units and as well as CMS issues large and small (such as critical care hospitals). If you administer claims, this is the place to be!</p> <p><b>Moderator:</b> Russell Workman, Director, Claims Experience &amp; Provider Relations, Aetna, Nashville, TN</p>
	Schaumburg EFGH	<p><b>20. CALL CENTERS: DELIVERING THE ULTIMATE</b> The latest from call center specialists whose companies handle thousands of Medicare insurance calls (often daily).</p> <p><b>Session Director:</b> Steven Prince, Vice President, Marketing, Integrity Marketing Group, Dallas, TX Elliot Alicea, Co-Founder, Empirical360.com, Oldsmar, FL Tatiana Blanco-Bertolo, Agency Development Manager, Google, New York, NY</p>
10:30 - 12:00 PM	Schaumburg East	<p><b>21. FORECAST 2025: THE FUTURE OUTLOOK FOR MEDICARE INSURANCE D-2-C</b> Direct to consumer's leading practitioners break out their crystal ball and peer ahead to forecast their outlook for the future for D-2-C strategies and technologies specific to Medicare Advantage and Medicare Supplement (PDP) plans markets.</p> <p><b>Session Director:</b> Lisa Zamosky, Senior Director, eHealth, Santa Clara, CA Chris Hakim, Senior Vice President and General Manager, eHealth, Santa Clara, CA</p>
	Schaumburg West	<p><b>22. BEFORE YOU HEAD HOME: A SPECIAL SESSION FOR MEDICARE AGENTS &amp; BROKERS</b> Top sellers ... top sales trainers ... gather to share their top recommendations to help you build your personal Medicare insurance sales in 2020 ... 2021 ... 2025. Don't leave Chicago without hearing what they have to share and without hearing how they answer questions posed by conference attendees.</p> <p><b>Session Director:</b> Lloyd Lofton, Sales Hero, Power Behind The Sales, Atlanta, GA Josh Slattery, Vice President of Medicare, The Brokerage, Inc., Flower Mound, TX Chris Westfall, President, MedicareAgentTraining.com, Mount Pleasant, SC</p>

*- Friday program continues on the next page*

**Schaumburg ABCD 23. MEDICARE COST PLANS - UNDERSTANDING THE MARKET AND SALES OPPORTUNITY**  
40% of the country is eligible for Medicare Cost Plans. Offered by 8 insurance companies, this is your chance to understand exactly how Cost Plans work and meet consumer needs. If you are an FMO - how to market them. If you are an AGENT / BROKER - how they can fit into your Medicare business.  
**Session Director:** Jason Yoo, Director of Field Sales, Consumer Markets, Medica, Omaha, NE

---

**Schaumburg EFGH 24. LATEST & GREATEST DATA SOURCES FOR TECHNOLOGY IN THE SENIOR SPACE**  
Focused on helping Medicare insurance eligible consumers make faster and better decisions, leading tech experts will explore the best utilization of data sources including CMS's Blue Button, provider networks, drug and formulary data for quoting systems and other applications.  
**Session Director:** Pat Kelly, Director of Sales, Vericred, Schaumburg, IL  
Samuel Halpern, Director of Internet Marketing, Senior Market Sales, Omaha, NE

---