

UPDATED APRIL 13, 2021 INTERESTED IN SPEAKING: Call 818-597-3205

## WEDNESDAY, SEPT. 8, 2021

TIME	LOCATION	AGENDA
8:00 AM - 3 PM	ADVENTURE HALL	EXHIBIT HALL OPEN
	Get Details At Event	ATTEND TWO TRACKS OF SESSIONS <b>Track 1:</b> Selling Medicare Insurance Solutions (Medigap, Medicare Advantage, PDP Plans) <b>Track 2:</b> Lead Generation and Social Media Prospecting, Technology, Building Your Business See the full program and schedule online at <a href="http://www.medicare supp.org/free">www.medicare supp.org/free</a>

## PRE-CONFERENCE TECHNICAL ROUNDTABLES

Utopia and Nirvana Ballrooms are located in the Conference Center on the 2nd Level (Escalator up)

1:00 PM - 2:30 PM UTOPIA A - B

### 1. LEGAL - COMPLIANCE - REGULATORY ROUNDTABLE

Join with peers from across the Medicare insurance industry to discuss (need help here).

Roundtable Leaders:

John Greene, Vice President of Congressional Affairs, NAHU, Washington, D.C.

Christina Wagner, Associated Director of Regulatory Affairs, UnitedHealthcare, Philadelphia, PA

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818-597-3205

UTOPIA C - D1

### 2. CLAIMS ROUNDTABLE

Join with Claims peers from across the industry to discuss claims hot topics including what's new on the fraud front and suspected fraudulent DME vendors.

Roundtable Leaders

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Jason Gallant, National Director - Life & Health, Claims Bureau USA, Atlanta, GA

Russell Workman, Director, Claims Experience and Provider Relations, Aetna, Franklin, TN

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3:00 PM - 4:30 PM UTOPIA A - B

### 3. ACTUARIAL - PRICING ROUNDTABLE

Discuss the latest critical issues and trends from an actuarial perspective. Current and emerging challenges facing Medicare Supplement and complementary products.

Roundtable Leaders:

Kenneth Clark, FSA, MAAA, Principal and Consulting Actuary, Milliman, Chicago, IL

Nick Ortner, FSA, MAAA, Consulting Actuary, Milliman, Brookfield, WI

Simon Tang, FSA, MAAA, Senior VP Health Pricing Actuary, iptiQ Americas L&H, Armonk, NY

Minhe Yu, FSA, MAAA, Actuarial Senior Director, Cigna, Farmington, CT

UTOPIA C - D

### 4. UNDERWRITING ROUNDTABLE

Join with underwriting experts from across the industry to discuss implications from Covid, automated point of sale decisioning and how others are using of medical claim data.

Roundtable Leaders:

Scott Collier, Pharm. D., Product Manager, Medical Data, Milliman Intelliscript, Brookfield, WI

Joe Iannetti, Vice President & Chief Underwriter, Group & Specialty Products, Gen Re, Stamford, CT

Christopher Pike, Underwriting Leader, Aetna Senior Supplemental Insurance, Franklin, TN

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## CONFERENCE OPENING RECEPTION

5:15 - 7:00 PM

NIRVANA

OPENING RECEPTION SPONSOR  
USA Senior Care Network



THURSDAY, SEPT. 9, 2021

TIME	LOCATION	AGENDA
7:00 AM <i>Program begins at 7:30 AM</i>	SCHAUMBURG A-D & WEST BALLOOMS	<p><b>BREAKFAST</b> <b>BREAKFAST SPONSOR - AmeriLife</b></p> <p><b>KEYNOTE: PROSPERING IN A DRAMATICALLY DIFFERENT POST-COVID WORLD</b> After every major event, change and transformation occurs. Success will be determined by how and how well companies, distributors and producers differentiate themselves. React late or react early; it's in your hands. <b>Joseph Jordan, President, JosephJordan.com, New York, NY</b></p>
9:00 - 10:15 AM	SCHAUMBURG EAST  <i>This Panel Is Filled</i>	<p><b>5. SHIFT HAPPENS: MEDICARE DISTRIBUTION ADAPTS TO THE NEW AND NEXT 'NORMAL'</b> What will a post-pandemic future look like in terms of Medicare insurance distribution? Our panel will share what changes they believe will stick and what they are planning for an ever-changing world. What's worked to adapt their field force to virtual sales? If you've thought about where Medicare distribution is heading, this is the session to hear and get your questions answered. <b>Moderator: Jeff Smedsrud, President of Insurance, Healthcare.com, Scottsdale, AZ</b> <b>Andy Dastur, President, North American Life Plans, Frisco, TX</b> <b>Brian Garity, President, Garity Associates Brokerage, Boston, MA,</b> <b>Sylvia Gordon, President, Gordon Marketing, Noblesville, IN</b> <b>Patrick Rodriguez, President, AGA, Anaheim, CA</b> <b>Craig Taylor, Assistant Vice President, Senior Market Sales, Omaha, NE</b> <b>Adam Wasmund, Chief Development Officer, Jack Schroeder &amp; Associates, Fort Myers, FL</b></p>
	SCHAUMBURG E - H	<p><b>6. KEEPING CUSTOMERS: WHAT'S CURRENTLY WORKING</b> Everyone wants new business. No one wants to lose policyholders. Member retention is critical to long-term success and profitability. What's working to keep customers? How are companies working with distribution to maximize results? A panel discussion explores strategies and answers questions. <b>Session Director: Melissa Price, Manager, Customer Experience &amp; Loyalty, Aetna Senior Supplemental, TN</b> 2. 3.</p>
	UTOPIA	<p><b>7. ACTUARIAL PERSPECTIVES: MACRA TO COVID TO OTHER EMERGING ISSUES</b> The nation's top actuarial experts always come prepared to address timely topics and share the latest data and perspectives. Issues they may address include MACRA and Covid impacts, loss ratios challenges, cross-selling opportunities and other important factors that impact Medigap today and into the future. <b>Session Director: Nick Ortner, FSA, MAAA, Consulting Actuary, Milliman, Brookfield, WI</b> <b>Brenton Pyle, Principal and Consulting Actuary, SCG Consulting LLC, Omaha, NE</b> 3. 4.</p>
	NIRVANA	<p><b>8. ANCILLARY BENEFITS SHOWCASE: INCREASE CLIENT ENGAGEMENT &amp; AGENCY SALES</b> Ancillary products are a great way to increase business, build stronger relationships with existing clients and open doors to new ones. Discover some of the latest offerings that dovetail with Medicare insurance markets.  <b>Session Director:</b> <b>Dr. Carrie Meyer, Au.D., Director of Clinical Programs, Amplifon Hearing Health Care, Minneapolis, MN</b> 3. 4.</p>
10:15 - 10:45 AM	EXHIBIT HALL	COFFEE AVAILABLE IN THE EXHIBIT HALL
10:45 - 12:00 PM <i>continued next page</i>	SCHAUMBURG EAST	<p><b>9 - LEGISLATIVE &amp; REGULATORY UPDATE: WHAT'S HAPPENED - WHAT'S ON THE HORIZON</b> The yearly briefing by leading experts. Changes that have or will impact Medicare, Medigap and MA plans. Plus a look at latest legislation impacting Rx drug pricing at both the federal and state level. As always, your opportunity to ask questions and hear those raised by your peers from across the industry <b>John Greene, Vice President of Congressional Affairs, NAHU, Washington, D.C.</b> <b>William Hepscher, President, The Canadian Medstore, Zephyrhills, FL</b> <b>Christina Wagner, Associated Director of Regulatory Affairs, UnitedHealthcare, Philadelphia, PA</b></p>

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10:45 - 12:00 PM

continued

**SCHAUMBURG**

**E - H**

**10 - FORECAST 2026: THE FUTURE OUTLOOK FOR MEDICARE INSURANCE D-2-C**

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. What will the next 5 years look like?

**Session Director:** Jennifer Hickman, Executive VP, Consulting, Wunderman Thompson, Chicago, IL

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**UTOPIA**

**11 - BEHAVIORAL SCIENCE'S IMPACT ON MEDIGAP PRODUCT DEVELOPMENT / MARKETING**

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.

**Session Director:** Donna Jermer, Head B2C Marketing, Sr. Vice President, iptiQ Americas, Armonk, NY  
Niels Keuker, Chief Marketing & Sales Officer, iptiQ Americas, Armonk, NY

Jamie Pickles, General Manager of Insurance, Jornaya, Philadelphia, PA

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**NIRVANA**

**12 - GRAND CHALLENGES: GROWING MEDICARE SUPPLEMENT; WHAT WILL IT TAKE?**

The future of Medicare Supplement is impacted by challenges from Medicare Advantage, the economic impact of Covid to postponed retirements. Will population alone account for sales growth? Strategists counseling the nation's leading Medicare Advantage and Medigap players share their insights.

Lindsay Resnick, Executive Vice President, Wunderman Thompson Health, Chicago, IL

Matt Feret, Chief Sales Officer and Executive Director, Medicare at Aetna, Chicago, IL

Ryan McMillan, VP Sales, Senior and Individual at Bankers Fidelity Life Insurance Co., St. Louis, MO

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12:00 PM

**SCHAUMBURG A-D  
& WEST BALLROOMS**

**NETWORKING LUNCHEON**

**LUNCHEON SPONSOR - Genomic Life**



**KEYNOTE: THE VIEW FROM WASHINGTON - BIDEN & BEYOND**

What Medicare changes and issues are legislative power brokers and key strategists / influencers talking about? Will any of their talk result in changes for Medicare, Medicare Supplement and Advantage?

Robert Blancato, President, Matz Blancato & Associates, Washington, D.C.

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2:00 - 3:15 PM

**SCHAUMBURG  
EAST**

*This Panel Is Filled*

**13 - LEAD GENERATION SHOWCASE: FOR DISTRIBUTORS AND AGENTS**

The 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.

**Session Director:** Richard Bufkin, President, Target Leads / Senior Direct, Monterey, CA

Acquire Direct - Danny Yaldor, Director of Business Development, Tampa, FL

Benepath - Clelland Green, President, Newton Square, PA

Dialog Direct - Chris York, Senior Vice President, Highland Park, MI

Giant Partners - Carl Ball, Digital Marketing Sales Director, Thousand Oaks, CA

Lead Concepts - Chris Weir, President, Irving, TX

Sales Data Pro - Brian Ebersole, Partner, Lake Forest, CA

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**SCHAUMBURG  
E - H**

**14 - 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

Bryan Adams, CEO, Integrity Marketing Group, Dallas, TX

Scott Perry, CEO, AmeriLife, Clearwater, FL

Ty Wooldridge, President, Aetna Senior Supplemental Insurance, Franklin, TN

Joe Hefermann, President, Insurance Solutions, UnitedHealth Group, Minneapolis, MN

2:00 - 3:15 PM

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UTOPIA

**15 - CALL CENTERS: BUILD ONE, BUY ONE, FIND ONE**

From building to partnering, Call Center CEOs address outsourcing strategies that provide competitive advantages / opportunities for insurers and FMOs/General Agencies. If you've thought about where Medicare direct-to-consumer sales are heading, this is the session to hear and get your questions answered.

**Moderator:** Jagger Esch, President, CEO, Elite Insurance Partners, LLC, Clearwater, FL  
Bryan Keevan, VP Managed Care Solutions, YourMedicare, Clearwater, FL

2. Robert McMichael, CEO, ConnectionPoint Mike Lowery

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**16 - KEY FINDINGS: FIRST NATIONAL MEDICARE MARKETING & DISTRIBUTION SURVEY**

Results of the 2021 nationally conducted survey of agents who market Medicare solutions and FMOs who distribute these products. What do producers value and look for? Must hear info if you work with, plan to recruit or retain agents and brokers. Panel of survey participants and contributors dig deeper to discuss and explain the findings.

**Presenters:** Edna Vasquez-Dretzka, Managing Director, Healthcare, Greenwald Research, Washington, DC

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3:15 - 3:45 PM

Exhibit Hall

COFFEE AVAILABLE IN THE EXHIBIT HALL

THE HALL CLOSSES AT 4:30 PM

3:45 - 5:00 PM

SCHAUMBURG

**17 - 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.

*This Panel Is Filled*

**Session Director:** John Jevin, Senior Director, Aetna Medicare IT Delivery, Franklin, TN

Beth Burke, Director, Product Management, Connecture, Roswell, GA

Aaron Kassover, Founder, AgentMethods, Seattle, WA

Krish Krishnan, President, Magnifact, Chicago, IL

Samuel Llanes, Vice President, Sales, RX Savers, LLC., Ft. Lauderdale, FL

Devin Rubin Principal and Chief Technology Officer Golden Years Design Benefits, Freehold, NJ

Gustavus Smith, Head of Sales, Trusty.care, New York, NY

Andrew Watson, Director of Product Development, CSG Actuarial, Omaha, NE

SCHAUMBURG  
E - H**18 - VIRTUAL SELLING: WHAT'S WORKING & WHAT IT TAKES TO BE SUCCESSFUL**

A panel of experienced experts will each share their strategies for creating connections, booking appointments, utilizing online webinars and other online selling platforms. There's no one-way to achieving virtual sales success so you'll want to hear from them all ... and get your questions answered.

*This Panel Is Filled*

**Moderator:** Tony Merwin, Senior Marketing Director, Precision Senior Marketing, Austin, TX

Cody Askins, CEO, Cody Askins LLC, Springfield, MO

Justin Brock, President, Medicare Gurus, Tupelo, MS

Eric Fierro, Founder, SeniorSalesUniversity.com, Phoenix, AZ

Joanne Giardini Russell, President, Giardini Medicare, Brighton, MI

Josh Lustig, Director, Medicare Division, Camas Prairie Insurance, Cottonwood, ID

Chris Westfall, Sr., President, MedicareAgentTraining.com, Charleston, SC

UTOPIA

**19 - 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:** Scott Coller, Pharm. D., Product Mgr, Medical Data, Milliman Intelliscript, Brookfield, WI

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**20 - MEDICARE LEAD ADVERTISING: HOW DO YOU COMPETE WITH JOE NAMATH & 1776?**

With over \$500 million being spent on advertising to generate Medicare leads, what advertising and lead-generation strategies & messaging will work to generate profitable Medicare insurance business. Top experts share their advice for those planning small ... mid-sized ... and super-sized ad spends.

**Session Director:** Dave Thomas, CEO, Thomas Arts, Farmington, UT

Mary Corley, Vice President, Campaign Strategy, Wunderman Thompson, St. Louis, MO

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5:15 - 7:00 PM

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WEST

NETWORKING RECEPTION

RECEPTION SPONSOR - AVAILABLE

## FRIDAY, SEPT. 10, 2021

TIME	LOCATION	AGENDA
7:15 AM <i>Program begins at 7:45</i>	SCHAUMBURG A-D WEST	<p><b>BREAKFAST</b>  <b>BREAKFAST SPONSOR</b> - AVAILABLE</p> <p><b>MEET THESE FIRST-TIME CONFERENCE SPONSORS</b></p> <p>We welcome those companies that are new to the National Medicare Supplement Conference and want to give them a few minutes to share why they attended ... and how they can help you succeed until we all meet up again!</p> <p><b>Paperclip, Inc.</b> - Yvette Saenz, Account Executive, Albuquerque, NM  <b>Zelis</b> - Colin Hadican, Vice President Business Development, Bedminster, NJ</p> <p>3.</p>
9:00 - 10:15 AM	SCHAUMBURG EAST	<p><b>21 - REMOTE TRANSACTIONS: TECHNOLOGY OF THE FUTURE CHANGING BUSINESS TODAY</b>  Covid accelerated the need and use of electronic platforms. Meanwhile everyone is building D2C experiences hoping to win a self-enrollment windfall. What's been learned from MA and Medigap enrollment trends? How important is e-Signature? What lies ahead in the rapidly tech landscape?</p> <p><b>Session Director:</b> Ross Blair, CEO, SunFire Matrix, Inc., Boston, MA  Matt Graham, Vice President, Managed Care Solutions, AmeriLife, Clearwater, FL  Samuel Halpern, Vice President, Divisional Director, Senior Market Sales, Milwaukee, WI</p>
	SCHAUMBURG E - H	<p><b>22 - NATIONAL MEDICARE CONSUMER STUDIES: MEDIGAP SHOPPING &amp; ENROLLMENT</b>  Findings of the latest national studies of Medicare / Healthcare insurance buying decisions. Data on how Medicare buyers at different ages shop. Understand what's working to best capture buyers, best strategies to convert current policyholders and successful strategies to retain and expand your business.</p> <p><b>Session Director:</b> Susan Plumer, Vice President, Sales, Connecture, Chicago, IL  Tim Brousseau, Senior Vice President, Client Services, Deft Research, Chicago, IL  Bill Keyes, Senior Sales and Marketing Leader, Connecture, St. Petersburg, FL</p>
10:30 - 12:00 PM	SCHAUMBURG EAST	<p><b>23 - SECRETS TO A SUCCESSFUL ENROLLMENT TECHNOLOGY ROLLOUT</b>  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.</p> <p><b>Moderator:</b> Jill Henderson, COO, Neishloss &amp; Fleming, an Integrity Marketing Group Co., Pittsburgh, PA</p> <p>2. 3.</p>
	SCHAUMBURG E - H	<p><b>24 - THE FINAL WORD FROM TOP AGENTS; WHAT THEY LEARNED - WHAT THEY'RE PLANNING</b>  Don't miss hearing from this panel of top Medicare insurance agents. What did they learn at this year's conference? What are they planning to do for continued success? And, a final chance to ask your questions before heading home.</p> <p><b>Session Director:</b> UHC</p> <p>2. UHC 3. UHC</p> <p>Mike Alexander, Sr., Owner, The Medicare Whisper, Houston, TX  Michele Malooley, Malooley Insurance, Boynton Beach, FL</p> <p>6. Jesse to fill</p>

This concludes our conference program.

Thank you for attending.