

EXPANDED SPACE - POSTED AUGUST 30

WEDNESDAY, SEPT. 8, 2021

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

TECHNICAL ROUNDTABLES

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

1:00 PM - 2:30 PM	UTOPIA A - B	<p>1. LEGAL - COMPLIANCE - REGULATORY PROFESSIONALS ROUNDTABLE Join with peers from across the Medicare insurance industry to discuss (need help here).</p> <p>Roundtable Leaders: John Greene, Vice President of Congressional Affairs, NAHU, Washington, D.C. Jayne Rothman, Chief Legal Officer, Integrity Marketing Group, Dallas, TX</p>
	UTOPIA C - D1	<p>2. CLAIMS PROFESSIONALS 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.</p> <p>Roundtable Leaders: Jason Gallant, National Director - Life & Health, Claims Bureau USA, Atlanta, GA Brenda Hatch, Assistant Vice President Insurance Services, AmeriLife, Clearwater, FL Lori Watson, Claims Executive, Gen Re - A Berkshire Hathaway Company, Portland, ME</p>
3:00 PM - 4:30 PM	UTOPIA A - B	<p>3. ACTUARIAL - PRICING PROFESSIONALS ROUNDTABLE Discuss the latest critical issues and trends from an actuarial perspective. Current and emerging pricing, product development and challenges facing Med Suppt and complementary products.</p> <p>Roundtable Leader: Nick Ortner, FSA, MAAA, Consulting Actuary, Milliman, Brookfield, WI</p>
	UTOPIA C - D	<p>4. UNDERWRITING PROFESSIONALS 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.</p> <p>Roundtable Leaders: Scott Coller, 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 Cecil Ramotar, Vice President and Senior Underwriting Executive, Gen Re, Stamford, CT</p>

CONFERENCE OPENING RECEPTION

5:15 - 7:00 PM	NIRVANA	OPENING RECEPTION SPONSOR USA Senior Care Network
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THURSDAY, SEPT. 9, 2021

TIME	LOCATION	AGENDA
7:00 AM <i>Program begins at 7:30 AM</i>	EXPLORATION Convention Center	BREAKFAST BREAKFAST SPONSOR - AmeriLife  KEYNOTE: PROSPERING IN A DRAMATICALLY DIFFERENT POST-COVID WORLD 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. Joseph Jordan, President, JosephJordan.com, New York, NY
9:00 - 10:15 AM	SCHAUMBURG EAST	5. SHIFT HAPPENS: MEDICARE DISTRIBUTION ADAPTS TO THE NEW AND NEXT 'NORMAL' 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. Moderator: Jeff Smedsrud, President of Insurance, Healthcare Insurance Services, Minneapolis, MN Andy Dastur, President, North American Insurance Services, Frisco, TX Brian Garity, President, Garity Associates Brokerage, Boston, MA, Sylvia Gordon, President, Gordon Marketing, Noblesville, IN Patrick Rodriguez, President, AGA, Anaheim, CA Craig Taylor, Assistant Vice President, Senior Market Sales, Omaha, NE Anthony Bahr, Vice President of Marketing, Jack Schroeder & Associates, Green Bay, WI
	SCHAUMBURG E - H	6 ANCILLARY BENEFITS SHOWCASE: INCREASE CLIENT ENGAGEMENT & AGENCY SALES 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. Session Director: Dan Mangus, Vice President of Sales, Senior Marketing Specialists, Columbia, MO Sharon Alford, Vice President, VSP Vision Care, Sacramento, CA Ryan Baum, Vice President of Business Development, TruHearing, Clifton Park, NY Charlie Erwin, Broker Development Manager, Careington International Corporation, Frisco, TX Doug French, Chief Actuary, Genomic Life, Austin, TX Samuel Llames, CEO, RX Savers, Parkland, FL Dr. Carrie Meyer, Au.D., Director of Clinical Programs, Amplifon Hearing Health Care, Minneapolis, MN Greg Olund, Senior Account Executive Specialty Markets, Renaissance Life & Health, Minneapolis, MN
	UTOPIA	7. ACTUARIAL PERSPECTIVES: MACRA TO COVID TO OTHER EMERGING ISSUES 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. Session Director: Nick Ortnier, FSA, MAAA, Consulting Actuary, Milliman, Brookfield, WI Ken Clark, FSA, MAAA, Principal and Consulting Actuary; Milliman; Chicago, IL Pat Fleming, FSA, MAAA; EVP, Product Innovation & Corporate Actuary; AmeriLife; Clearwater, FL Brenton Pyle, FSA, MAAA, Principal and Consulting Actuary, CSG Consulting LLC, Omaha, NE
	NIRVANA	8. REMOTE TRANSACTIONS: TECHNOLOGY OF THE FUTURE CHANGING BUSINESS TODAY 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? Matt Graham, Vice President, Managed Care Solutions, YourMedicare, Clearwater, FL Samuel Halpern, Vice President, Divisional Director, Senior Market Sales, Milwaukee, WI Harsh Singla, Integrity Marketing Group, Chief Technology Officer
10:15 - 10:45 AM	EXHIBIT HALL	COFFEE AVAILABLE IN THE EXHIBIT HALL

10:45 - 12:00 PM

**SCHAUMBURG
EAST**

9 - LEGISLATIVE & REGULATORY UPDATE: WHAT'S HAPPENED - WHAT'S ON THE HORIZON

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

John Greene, Vice President of Congressional Affairs, NAHU, Washington, D.C.
William Hepscher, President, The Canadian Medstore, Zephyrhills, FL

**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: Mary Corley, Vice President, Campaign Strategy, Wunderman Thompson, St. Louis, MO
Robert Bache, Chief of Sales, Senior Healthcare Direct, Clearwater, FL

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

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.

Jim Polittle, Executive Vice President, Wunderman Thompson Health, St. Louis, MO
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
Bryan Derheim, Vice President, Senior Products, National General, Duluth, MN

12:00 PM

**EXPLORATION
Convention Center**

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.

2:00 - 3:15 PM

**SCHAUMBURG
EAST**

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

**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: Vincent DeMarco, President & CEO, Gen Re - A Berkshire Hathaway Co. 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 Hafermann, President, Insurance Solutions, UnitedHealth Group, Minneapolis, MN

2:00 - 3:15 PM

continued

UTOPIA

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

From building to partnering, Call Center pros 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.

Session Director: Gary Prado, CEO, Prospect Boss, Savannah, GA
Ken Brannigan, Chief Operations Officer, Senior HealthCare Solutions, Titusville, FL
Jagger Esch, Co-Founder, CEO, Elite Insurance Partners, Clearwater, FL
Bryan Keevan, VP Managed Care Solutions, YourMedicare, Clearwater, FL
Robert McMichael, President, Connexion, Sandy, UT
Ryan Peters, Director of Contact Center Digital Transformation, NobelBiz, Houston, TX

NIRVANA

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
Mike Smith, President, The Brokerage, Inc., Flower Mound, TX

3:00 - 3:45 PM

Exhibit Hall

COFFEE AVAILABLE IN THE EXHIBIT HALL

THE HALL CLOSSES AT 4:00 PM

3:45 - 5:00 PM

SCHAUMBURG
EAST

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.

Session Director: Devin Rubin Principal and Chief Tech Officer Golden Years Design Benefits, Freehold, NJ
Beth Burke, Director, Product Management, ConnectureDRX, Roswell, GA
Joel Benson, Founder, EventNetUSA, Fort Lauderdale, FL
Krish Krishnan, President, Magnifact, Chicago, IL
Samuel Llanes, Vice President, Sales, RX Savers, LLC., Ft. Lauderdale, FL
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.

Moderator: Tony Merwin, Senior Marketing Director, Precision Senior Marketing, Austin, TX
Cody Askins, CEO, Cody Askins LLC, Springfield, MO
Joanne Giardini Russell, President, Giardini Medicare, Brighton, MI
Renee Shannon, President, Today's Benefits Group, Fort Worth, TX
Chris Westfall, Sr., President, MedicareAgentTraining.com, Charleston, SC

UTOPIA

19 - MEDIGAP UNDERWRITING IS CHANGING; HOW ANALYTICS IMPACTS PREDICTABILITY

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

Session Director: Scott Collier, Pharm. D., Product Mgr, Medical Data, Milliman Intelliscript, Brookfield, WI
Cecil Ramotar, Vice President and Senior Underwriting Executive, Gen Re, Stamford, CT
Dr. Anitha Rao, MD, MA, CEO & Founder, Neurocern, Chicago, IL

NIRVANA

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

With \$500+ million spent on advertising to generate Medicare leads, what advertising and lead-gen strategies & messaging will work to generate profitable Medicare insurance business. Top ad, DM & Facebook 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
Bob Donnellan, VP of Sales & Marketing, RGI Data Assets, Atlanta, GA
Kathy Yang, Vice President Business Development, Digital Moses, Chicago, IL
Jordan Yospe, Chief Innovation Officer, Thomas Arts, Farmington, UT

5:15 - 7:00 PM

SCHAUMBURG A - D
SCHAUMBURG WEST

NETWORKING RECEPTION

RECEPTION SPONSOR - TruHearing

TruHearing

FRIDAY, SEPT. 10, 2021

TIME	LOCATION	AGENDA
7:15 AM	SCHAUMBURG A- D SCHAUMBURG WEST	BREAKFAST BREAKFAST SPONSOR - Integrity Marketing Group
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<i>Program begins at 7:35</i>		
MEET THESE FIRST-TIME CONFERENCE SPONSORS		
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!		
Insurance Marketing Hub - Cindy Seel, President & CEO, Richmond, VA		
NationalCare Dental - Sam Melamed, CEO, Dallas, TX		
Paperclip, Inc. - Yvette Saenz, Account Executive, Albuquerque, NM		
Zelis - Colin Hadican, Vice President Business Development, Bedminster, NJ		
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9:00 - 10:15 AM	SCHAUMBURG EAST	21 - SECRETS 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: Jill Henderson, COO, Neishloss & Fleming, an Integrity Marketing Group Co., Pittsburgh, PA Jake Christensen, ThomasArts, Chief Experience Officer, Salt Lake City, UT Harsh Singla, Integrity Marketing Group, Chief Technology Officer Bryan Neary, CSG Actuarial LLC, Principal and Co-Founder, Omaha, NE Susan Plumer, Connecture, Vice President Sales/Market Leader, Chicago, IL
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	SCHAUMBURG E - H	22 - CHECK ONLINE TO SEE ANY PROGRAM DETAILS FOR THIS ROOM www.MedicareSupp.org/chi
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10:30 - 12:00 PM	SCHAUMBURG EAST	23 - THE FINAL WORD FROM TOP AGENTS; WHAT THEY LEARNED - WHAT THEY'RE PLANNING 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. Session Director: John Herbut, Regional Director of Sales, UnitedHealthcare, North Wales, PA Mike Alexander, Sr., Owner, The Medicare Whisper, Houston, TX Laura Fagan, Owner, Jersey Senior Advisors, Fair Haven, NJ Cameron Giardini, Giardini Medicare, Howell, MI Michele Malooley, Malooley Insurance, Boynton Beach, FL Tracy McManamon, President, One Source Benefits, Steubenville, OH Candace Reistrom, Agent, UnitedHealthcare, St. Petersburg, FL Jane Sanchez, President, AEGIS Resources, Huntley, IL
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	SCHAUMBURG E - H	24 - NATIONAL MEDICARE CONSUMER STUDIES: MEDIGAP SHOPPING & ENROLLMENT 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. Session Director: Susan Plumer, Vice President, Sales, ConnectureDRX, Chicago, IL Tim Brousseau, Senior Vice President, Client Services, Deft Research, Chicago, IL
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This concludes our conference program.

Thank you for attending.