



**Medicare Summit  
Information –  
“How To” Manual  
2023**

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# THE MEDICARE MARKET AND NEED FOR MEDICARE SUMMITS

Medicare is the federal health insurance program created in 1965 for people ages 65 and over, regardless of income, medical history, or health status. The plan was expanded in 1972 to cover people under age 65 with permanent disabilities. Today, Medicare plays a crucial role in providing health and financial security to 59 million older people and younger people with disabilities. The program helps to pay for many medical care services, including hospitalizations, physician visits, and prescription drugs, along with post-acute care, skilled nursing facility care, home health care, hospice care, and preventive services.

Looking ahead, Medicare spending (net of income from premiums and other offsetting receipts) is projected to grow to \$11,159 billion in 2027.

**About 10,000 people are now enrolling in Medicare every day.** That's a record surge in Medicare enrollment, and it's expected to continue for the next 15 years, as the Baby Boomers age into their golden years. If current trends hold the CBO projects that 80 million Americans will be Medicare-eligible by 2035. It also means that the total number of Medicare beneficiaries is expected to double within the next twenty years.

As more Americans enter the Medicare-eligible market, more producers will be needed to service their needs **and a growth market for the insurance industry!**

As the Medicare market has been emerging for many years, NABIP recognized the need to supplement the information to Medicare agents in a unique and specific venue – **the Medicare Summit**. Local and State chapters from across the country are running successful Summits. Recruiting the Medicare-eligible market producer is a great way to expand and grow the chapter's membership. This is by far the most critical part of the planning/hosting a Medicare Summit for members in your chapter. Chapters across the country **that have been successful** have focused on broadening membership to the Medicare-focused producer.

Successful Medicare Summits are events filled with valuable knowledge, information, and access to vendors. Medicare agents will see the Medicare Summit as a must-attend event each year. **The goal is to give members valuable information but, more important, to reach agents who are not members of NABIP.** This is an added value of NABIP at the local level with a new audience.

Hosting a Medicare Summit is like most other events a chapter hosts during the year. All of the same elements of event planning are present. The critical difference is how chapters present partnership (sponsor) opportunities to vendors and **attract as many non-members as possible.**

It is essential to have a committee whose members are Medicare agents. We recommend that you have several NABIP agents from your chapter in addition to representation from major Medicare carriers and GAs. Ideas, feedback, input, and help are essential to making the event successful.

This instruction manual will give you the guidance and resources you need to plan, organize, conduct, communicate, and follow up on a Medicare Summit.

# PLANNING/ORGANIZING/CONDUCTING A MEDICARE SUMMIT

## Time Frame

It takes **about nine months** to plan a successful event. We recommend that you not plan a summit during Individual Market or Medicare open enrollment due to many people not being available for the event and because of the time commitment it will require from committee members - avoiding this conflict is essential. Holding the event in late spring through early fall is usually a reasonable timeframe for most. Save the date and partnership (sponsor) information should go out about five months prior. In year 2, you will want to book your venue immediately following the first Summit.

## Location

The host chapter will secure a location big enough for the event. Think of using a meeting room from a company, GA training area, hospital meeting room, hotel location or other venue space either rented or donated by a sponsor. The room size will determine the cap for attendees at the event. Locations for summits can vary based on the needs of your chapter. Destination venues are not recommended in the first year. Once the event becomes established, a destination venue could be more viable (out of the area). We recommend using a venue that you can grow into so the location remains the same for a few years. When you are planning a Summit, THINK BIG!

## Host committee

To be successful, a chapter should have a host committee who shares responsibility and offers different skills to the overall planning and running of the summit. One individual should be appointed as the chair of the committee to oversee that everything is assigned. A chapter may determine it is best to team up with another local chapter to combine resources and efforts. If more than one chapter is involved, at least 4-5 representatives from each of the host chapters should be on the committee. At least a few of the committee members should be familiar with the Medicare space, but it is not required that all committee members be experts. This will be particularly helpful in selecting topics, speakers and knowing who to reach out to for sponsors and attendee invites. Based on tasks needed to get done, your committee should have at least 10-12 members on it.

It is up to the discretion of the host chapter as to how much help or involvement they would like from NABIP. NABIP will support the local chapter's efforts and provide assistance as needed and as our resources allow. Some examples of what NABIP can help with include: suggestions for topics and speakers; working with sponsors; sending out press releases; and working with our Medicare FMO and GA Principals Council to promote the event to their producers, as well as giving them exhibitor and sponsorship opportunities.

## **The First Planning Meeting**

Gather 4-5 representatives from each of the chapters involved in the summit. The initial meeting should be **about 2 hours** to cover all the necessary materials. The Summit chair(s) should lead the meeting and coordinate the overall program. It is recommended that you have your First Planning meeting (or at the very least one of the first two meetings) at the site of the Summit. That way you can get a feel for the layout of the venue and what you can do with it. The venue should give you a staff room to meet in.

After the initial meeting, your committee will meet once a month leading up to the event and then weekly/bi-weekly the final month before the event.

### **Things to cover in the first meeting include**

- Mission and goals of the event
- Proposed date(s) for the event
- Decide on what kind of speakers your event will invite and what platform you will hold such as panel discussion versus breakout sessions
- Venue location
- Individual assignments (see below)
- Length of a summit and if it will include a break/ lunch

### **Individual Assignments to be determined during the first meeting**

During the first meeting committee members should assign the following tasks to help move the planning process along. Some individuals may have to take on multiple roles depending on the size of the planning committee.

#### **Overall Contact Person**

This individual will help organize future planning meetings, send out mass communications to the committee, and take minutes of each session and follow-up on any assignments. This individual must be well organized and be willing to reassign things if someone is no longer able to fulfill their duties. This individual will be the main point of contact between the committee and NABIP as well as be the point of contact for all communications that go out to the masses.

## **Speaker point of contact**

This individual will reach out to the potential speakers and invite them to be a part of the event. They will also be the point person to give any updates, schedule information and handle travel and hotel if necessary. This individual will gather the speaker's bio and headshot used in printed and digital materials. It is important to follow-up with speakers as the date approaches to make sure there are no changes or cancellations.

## **Outreach assignments**

Assign each committee member with a list of carriers, hospitals and GA's to reach out to for potential sponsorships, exhibitors and attendees.

## **Registration**

This individual will either work with NABIP or with another website to get registration up for the event. This will include posting all updated materials such as the agenda, meeting day/time/location, and pricing. Along with online registration, which is the preferred method, a paper form should be created (**see NABIP for template**) as well as flyers and sent to FMO's, general agencies, and carriers for their mailing lists and to be announced at local meetings and events. This individual will also handle the name badges, which NABIP can also help with the printing of if needed. They will keep a list of all those that have pre-registered or those that will register on-site if available.

## **Sponsorships**

ALL committee members should be gathering sponsors. Once the verbal agreement is in place, the sponsor liaison steps in. **NABIP can provide a template with different ideas for sponsorship and a sponsorship agreement**, but ultimately those determinations are up to the host chapter. NABIP can assist with the follow-up and contract. If the chapter wishes, NABIP will gather sponsorship payment, making sure the agreement is signed and following up about the sponsorship benefits provided such as complimentary registrations, ads for the program, company logos and all else needed per the contract.

## **Media Outreach and Advertising**

Getting the word out about the summit is vital. You may include contacting hospitals, neighboring chapters, local agents, FMO's and publications. If you can get into a broker magazine or local paper to advertise the event you may negotiate coverage or ads in return for them having a booth or table at the event and including their logo on printed materials. A press release should be sent out to the local media which will be done by the Public Relations department of NABIP.

## Location

This individual will be in charge of securing a meeting room and signing the contract if necessary. The entire committee should determine the location and look for potential "free" spaces from sponsors if available. NABIP can assist with suggestions of places, handling the agreement and other items that will be needed such as the room layout, food, and beverage, and making sure the appropriate A/V equipment is provided and set-up.

## Program

With the help of the entire committee, a schedule will include the time frame, speakers, and topics. This individual will be in charge of creating and printing the programs, any flyers or other materials that will be available at the event. NABIP can also assist with the design of these materials. This individual will be in charge of applying for CE credits and contacting NABIP about including a Medicare Certification if your summit wishes to include those.

## Registration

Online registration is the most preferred method for the Summit. NABIP will assist with registration through the NABIP.org website should the host chapter wish to use that service. If the chapter decides to handle it on their own, they will need to provide a website link and the appropriate information so that the information can make it to the website.

## Pricing (Registration Fee)

This host chapter will determine the fee based on the cost of the space, food and other expenses associated with the meeting. Sponsors can help offset the cost, but the goal of the sponsorships should be to generate revenue for the host chapter. **Based on prior experience from the chapters that have done these, it is recommended that the registration fee be the same for both members and non-members.** This strategy aims at drawing as many non-members as possible to the event. Some have found that an additional incentive provided to non-members who join at the event has been successful to increased membership numbers. This meeting should be a terrific opportunity for recruiting new members. In general, most chapters are charging \$49 to \$59 per person.



Here is a sample registration form for attendees:

Thursday, April 12th

1:00 pm - 5:00 pm Free (w/ registration) 4 Hr LTC Refresher  
5:30 pm - 7:30 pm Welcome Reception

Friday, April 13th

\_\_\_\_\_ 7:30 am - 8:30 am Registration/Breakfast – Networking with Sponsors  
\_\_\_\_\_ 8:30 am - 10:45 am General Session – Market Overview/Leg Update  
\_\_\_\_\_ 10:45 am - 11:15 am Break – Networking with Sponsors  
\_\_\_\_\_ 11:15 am - 12:15 pm Breakout Sessions – Dual Market/Group Market  
\_\_\_\_\_ 12:15 pm - 1:15 pm Lunch – Networking with Sponsors  
\_\_\_\_\_ 1:15 pm - 2:15 pm Breakout Sessions – Senior Awareness/Tools for Agents  
\_\_\_\_\_ 2:15 pm - 2:45 pm Break – Networking with Sponsors  
\_\_\_\_\_ 2:45 pm - 3:45 pm Carrier Panel Discussion  
\_\_\_\_\_ 3:45 pm - 4:45 pm Agent/Broker Panel Discussion  
\_\_\_\_\_ 4:45 pm - 5:00 pm Closing Remarks – Prize Drawings

**Please mark which of the sessions you plan to attend. Rooms are available at the Rosen for \$129/night. To reserve, go to [www.RosenPlaza.com](http://www.RosenPlaza.com) and use Group Code GRPFAHWM.**

**Registration fee: \$49.00 per attendee until 3/28/XX, then \$65.00.**

**Please include the name of attendee(s) on all checks submitted.**

Please provide the following information on all attendees.

Name \_\_\_\_\_  
Company \_\_\_\_\_  
Address \_\_\_\_\_  
Cell Phone Number \_\_\_\_\_  
E-mail address \_\_\_\_\_

**Please make check payable to Chapter.**

Mail checks and completed form to < Chapter Address> or complete this information to pay by credit card:

Name on Card \_\_\_\_\_ Billing Address  
City, State, Zip \_\_\_\_\_ Visa  
MasterCard \_\_\_\_\_ American Express \_\_\_\_\_ Discover  
Card Number \_\_\_\_\_ Exp. Date

Forms with completed credit card information can be emailed to <your email> or faxed to XXX-XXX-XXXX. If registering after X/XX/2023, please register onsite.

## Attendees

While this is an event for a chapter and their members, **it is also a great way to promote new membership**. By working with sponsors to get the word of the event out to their people and the local media, it will provide an opportunity for the local and national membership to grow.

Some chapters have been successful in providing an incentive for joining at the event as a way to promote membership. This is commonly done by refunding the event ticket fee if they join on-site.

Other chapters have been successful in getting a "membership" sponsor that allowed the chapter to use the money how they saw fit to promote membership. Some ideas include a photo booth, a "win" wheel with prizes attached, candy bars and reimbursement for the summit ticket along with a ticket to a local lunch meeting in the future. It is at the discretion of the host chapter if it is feasible with funds. Regardless of whether this takes place, or not, applications for local and state chapters and a membership representative should be readily available.

After NABIP approval, the chapter is allowed to offer \$50 off of the new member's annual dues (this will come off the national dues portion – state or local dues remain intact). This must be taken care of during the event itself. Usually, a table is set up for membership purposes. NABIP will send a unique application for new members to use when joining from a Medicare Summit.

It is strongly recommended that the host chapter gather a list of agents to target who are not members of NABIP. A list of Medicare agents can be purchased from the state Departments of Insurance. Ask carriers, GAs, and FMOs to send the registration information to their agents and you can reach the most significant number of Medicare agents in your area.

## Certifications

All Medicare producers need to get certified by each carrier they wish to represent, and they need to do so before open enrollment period begins (October 15th). Actually the Medicare producer has two things they need to do before open enrollment – getting carrier certified, and getting through the required AHIP (Association of Health Insurance Plans) testing.

Therefore we recommend having the first day (or half-day) dedicated to certifications from the carriers. Since this is required to sell, you will get a good number of producers attending, and some if not many will NOT be members of NABIP. What a great recruiting tool!

Offering certifications will also be a draw for the carriers and sponsors, as they will have the opportunity to get in front of many producers at one time. This also becomes a draw for the larger General Agencies and FMOs (Field Marketing Organizations).

## Topics

This will change from year to year as the industry adapts. Sought-out information/classes usually include information about Social Security, CMS, LTC, supplement selling, compliance issues, Medicare Advantage marketing, generating referrals, legislative updates from NABIP and prescription drugs. The host chapter should determine topics of the panel or tracks. Medicare general agents are helpful resources in selecting subject matter for the summit.

For larger meetings, it might be beneficial to break up the session in multiple tracks based on skill levels such as experienced agents and newbies.

Meetings hosted at the state level should include a representative from NABIP to talk about what is happening at a national level particularly on the regulatory and legislative side of things. NABIP has the most up-to-date information and can provide members with a look at what will happen in the future. NABIP will work with the chapter to give this representative to be at the local summit. Copies of our current Medicare newsletter will be provided to give out to all attendees of the summit.

If the summit wishes to include CE credits, it will be the host chapter's responsibility to contact the appropriate people for that state and go through the process of applying for it. NABIP and the Professional Development department can assist with the appropriate steps to take.

**If a chapter wishes to incorporate a Medicare certification with their summit, NABIP will handle that portion completely. This certification does have a cost associated with it but might be a nice incentive for those interested to do both the summit and certification at the same time.**

## Speakers

NABIP has a database of approved speakers that can be used by the host chapter to determine their agenda. For smaller meetings, it is recommended to hold a panel discussion with employees of various companies and backgrounds. These panelists could be from the sponsors, the local chapter, or larger organizations that work in the Medicare arena. Speakers can be found through local/regional carriers, FMOs (Field Marketing Organizations), and General Agents. If a sponsor is hosting a break-out session, it needs to be educational and not just commercial. All speakers and their content will need to be approved.

## Sponsors/Partners

The host chapter of this event will be in charge of contacting and securing sponsors. Potential sponsors should form a relationship with the host chapter leaders to provide more than just monetary donations. Potential sponsors should be sought out from FMOs (Field Marketing Organizations), general agents, the Medicare divisions of companies and physician groups. This is a great way to diversify the sponsorships for your chapter. Generally, carriers have different funds set aside for Medicare products. You should approach carriers (Medicare Advantage, supplements) as well as FMOs, GAs and Independent Practice Associations. **Remember – your sponsors are your partners. Refer to them as such. It will make them feel that they are part of something and more than just a source of money.**

Along with sponsorship money, the host chapter should arrange for sponsors to send out invitations to their employees and agents for the summit. This can be done through email communication, ads in their publications and on their website. The more people that know about the event, the more successful it will be, especially if a sponsor is inviting their people. These sponsors may have access to lists of interested persons that the chapter will not have.

Other sponsorship ideas include exchanging registrations for printed ads, meeting space or hosting the food and beverage. Sponsorships will traditionally be determined by the host chapter based on what the chapter will provide and what they will get in exchange.

Asking the right person at the organization is vital. Generally, the decision makers are the sales and marketing Vice Presidents. It is vital that the sponsors feel like they are receiving more than they are paying. It is how the messaging is handled and essential to the success of retaining quality partners each year. NABIP has a relationship with principal contacts for many of the FMOs around the country. Reach out for assistance.

Partners should be inviting their agents to the event via email, ads in their publications, etc. High attendance is crucial to successful events.

## Digital Media Campaign Program

One way to get top sponsorship dollars is to offer a program called the Digital Media Campaign, developed by Yolanda Webb of the Inland Empire Association of Health Underwriters (IEAHU) chapter. This is offered to Top Partners and is continued for one year. It is a great way to expose the partner to the chapter's membership via, but not limited to, Chapter Websites, Calendar of Events, banner/signage exposure during meetings, and produced videos from the partner. Instead of going to the partner numerous times a year for money, this program allows the partner to pay one fee for the year and get more value.

Consider the advantages for the sponsor/partner:

- One ROI (return on investment) for the partner is they are able to brand their company, which may be a need for a smaller company. They also show that they are agent friendly.
- It allows the partner to develop a plan to advertise products, services and events.
- It allows the attendees to be exposed to the partner via video – like a commercial or storyline of the partner.
- It will give the membership access to any email blasts that the partner wants to send out.
- The partner can dictate the level of exposure they want, and they don't necessarily have to be at every event.

What does the chapter need to do?

- Make sure that your media chair understands the reasoning for this program, and what will be shown on the chapter's website and/or newsletter.
- Develop a calendar of events the partner is holding and publish this on the website and/or the newsletter.
- Spotlight each one of the partners in your chapter newsletter – make it like an interview!
- ASK the partner what their needs are and show them how being a Top Partner can increase their visibility and sales from producers in this market.

When speaking to the company about being a Top Partner, emphasize that your chapter is changing the way they do business with carriers, General Agents, or anyone else who wants to be a sponsor. This type of commitment has never been done before, so if they don't like what you are doing, you can stop and re-evaluate their needs. A sample email to use is on page 20.

When looking at what your chapter should charge for this program, one recommendation is to have the top level at \$8,000 the next level at \$6,000, and 2 or 3 at \$4,000. Here is an example of what you can offer:

## Top Partners – Digital Media Campaign Program (Sample Sponsorship Program)

Sponsor/Partner Level	Description of Benefits
<p style="text-align: center;"><b>Top Showcase Sponsorship Level – \$8,000</b> (one available)</p>	<ul style="list-style-type: none"> <li>• Digital Media – Promo video posted to chapter website – Sponsor Page – with 50 to 100 word company description; Banner ad and link on website; sidebar ad with link to company website; calendar shown in chapter’s E-newsletter; promotion on chapter’s media outlets (Facebook, Linked In, Twitter) with video and articles posted quarterly.</li> <li>• 6 ft. display table and 2 chairs in the meeting room foyer with opportunity to display marketing materials at each monthly meeting.</li> <li>• 2 complimentary admissions to each monthly luncheon meeting.</li> <li>• PowerPoint slide – logo recognition on all meeting/event announcements.</li> <li>• Verbal recognition at all chapter events.</li> <li>• Tee Sign sponsorship at the chapter’s annual golf tournament or \$250 credit</li> <li>• \$350 luncheon sponsorship credit for a monthly chapter luncheon.</li> </ul>
<p style="text-align: center;"><b>Titanium Sponsorship Level \$6,000</b> (one available)</p>	<ul style="list-style-type: none"> <li>• Digital Media – Company logo with 50 to 100 word company description posted to chapter website – Sponsor Page; Banner ad and link on website; sidebar ad with link to company website; calendar shown in chapter’s E-newsletter; promotion on chapter’s media outlets (Facebook, Linked In, Twitter) with articles and event posting.</li> <li>• 2 complimentary admissions to six (6) monthly luncheon meeting.</li> <li>• PowerPoint slide – logo recognition on all meeting/event announcements.</li> <li>• Verbal recognition at all chapter events.</li> <li>• Tee Sign sponsorship at the chapter’s annual golf tournament or \$250 credit</li> <li>• \$300 luncheon sponsorship credit for a monthly chapter luncheon.</li> </ul>
<p style="text-align: center;"><b>Platinum Sponsorship Level \$4,000</b> (two available)</p>	<ul style="list-style-type: none"> <li>• Digital Media – Company logo with 50-100 word company description posted to chapter website – Sponsor Page; Banner ad and link on chapter website.</li> <li>• 2 complimentary admissions to anyone (1) general monthly luncheon meeting.</li> <li>• PowerPoint slide – logo recognition on all meeting/event announcements.</li> <li>• Verbal recognition at all chapter events.</li> <li>• Tee Sign sponsorship at the chapter’s annual golf tournament or \$250 credit</li> </ul>

Here is another example of sponsorship levels and benefits (for this event only), and a sample sponsorship registration form:

### **Show Sponsor - \$6,000**

- Two Exhibit Tables
- Priority placement of table location
- Ten attendee registrations to event + 4 staff registrations
- Recognition on promotional materials
- Honorable mention from the podium and State newsletter recognition
- Banner Ad on the FAHU website
- Opportunity to Provide Speaker for the Program
- (3 available until agenda is complete)

### **Lunch Sponsor - \$5,000**

- Exhibit Table
- The preferred placement of table location
- Eight attendee registrations to event + 3 staff registrations
- Honorable mention from the podium and State newsletter recognition
- Opportunity to make the 5-7 minute presentation at lunch
- (1 available)

### **Breakfast Sponsor - \$3,000**

- Exhibit Table
- The preferred placement of table location
- Five attendee registrations to event + 3 staff registrations
- Honorable mention from the podium and State newsletter recognition
- Opportunity to make a 3-5 minute presentation at breakfast
- (1 available)

### **A/V Sponsor - \$2,500**

- Exhibit Table
- Four attendee registrations to event + 2 staff registrations
- Honorable mention from the podium and State newsletter recognition
- (1 available)

### **Thursday Reception Sponsor - \$2,000**

- Exhibit Table
- Three attendee registrations to event + 2 staff registrations
- Opportunity to make a 2-3 minute presentation at the reception
- (2 available)

### **Name Badge Sponsor - \$1,500**

- Exhibit Table
- Two attendee registrations to event + 2 staff registrations
- Logo printed on attendee name badge/holder
- (1 available)

## Registration Sponsor - \$1,500

- Exhibit Table
- Two attendee registrations to event + 2 staff registrations
- Sponsor signage at Registration Booth
- (1 available)

## Refreshments Sponsor - \$1,250

- Exhibit Table
- Two attendee registrations to event + 2 staff registrations
- Sponsor signage at break
- (2 available)

## Exhibitor - \$750

- Exhibit Table
- Two staff registrations

## Thursday CE Sponsor - \$500 (if you are doing one)

- Table outside of CE classroom on Thursday afternoon
- Recognition on promotional materials
- (2 available)

# (Your Chapter) Medicare Summit – <Day, Month, 2023> Sponsor Registration Form

Company name: \_\_\_\_\_

Product/Service: \_\_\_\_\_

Contact name: \_\_\_\_\_ Title \_\_\_\_\_

Phone: Office (\_\_\_\_) \_\_\_\_-\_\_\_\_ Cell (\_\_\_\_) \_\_\_\_-\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Onsite Coordinator name: \_\_\_\_\_ Title \_\_\_\_\_

Phone: Office (\_\_\_\_) \_\_\_\_-\_\_\_\_ Cell (\_\_\_\_) \_\_\_\_-\_\_\_\_

Email: \_\_\_\_\_

Sponsorship level: \_\_\_\_\_ Cost: \$ \_\_\_\_\_

Additional attendee registrations \_\_\_\_\_ x \$49 each = \$ \_\_\_\_\_

Total: \$ \_\_\_\_\_ **or whatever you are charging)**

Payment mode: \_\_\_ Sending Check payable to XXHU \_\_\_ Credit Card

Name on card \_\_\_\_\_

Credit Card # \_\_\_\_\_ Expiration Date \_\_\_\_\_ CVV Code \_\_\_\_\_

Billing address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Signature \_\_\_\_\_ Date signed \_\_\_\_\_



## Submit to:

(Your Chapter)

(Address)

(City/Town, ST, Zip)

## Summit Agenda

Samples of the agenda can be found on the NABIP website. Here is a sample agenda:

### Medicare Summit Agenda

#### Thursday, April 12, 2018

- 1:00pm-5:00pm 4 Hour LTC Refresher CE Course or NABIP Medicare Certification Course  
5:30pm-7:30pm Welcome Reception

#### Friday, April 13, 2018

- 7:30am-8:00am Registration & Breakfast with Sponsors  
8:00am-8:30am General Session – Welcome and Overview - FAHU President – Steve Israel  
8:30am-9:20am Medicare Market Overview and Professional Development -1CE hour  
Presenter – Dwane McFerrin  
9:20am-9:35am Break/Networking  
9:35am-10:25am Centers for Medicare & Medicaid Services and Legislation – 1CE hour  
Presenters – Janet Trautwein & John Greene  
10:25am-10:45am Break/Networking  
10:45am-11:45am Insurance Carrier Panel Discussion, Moderated by Bob Tretter – 1CE hr.  
WellCare, United American, United HealthCare, Aetna (see questions pg. 15)  
12:00pm-1:00pm Lunch with Exhibitors  
1:00pm-1:50pm Breakout Sessions A: 1 of 2 Options -1CE hour  
Option 1 - Dual Market of Medicare and Medicaid, Presenter - Al Clancy  
Option 2 – Medicare in the Group Market - Presenter – Kathy Burton  
1:50pm-2:00pm Break – Networking  
2:00pm-2:50pm Breakout Session B: 1 of 2 Options – 1CE hour  
Option 1 – “Senior Ethics / Increase Your Awareness” Presenter – Theresa Cubillas Russell  
Option 2 - Tools available to the Medicare Agent, Presenter – Keith Giles  
2:50pm-3:00pm Break – Networking

3:00pm-3:50pm	General Session – Agent Panel Discussion – 1CE hour Panelists: Darry Schroader, David Raymond, Laura Kimble, Michele Malooley Moderated by: Steve Israel
3:50pm-4:30pm	Medicare and Senior Market Insurance Products - 1CE hour – Presenter – Darwin Hale
4:30pm-5:00pm	Five Steps to Building a Professional Practice - Presenter – Gary Owen
5:00pm-5:30pm	General Session – Closing remarks - Prize Drawings

We suggest that for the first year hosting an event, the agenda be kept to a one-day (or even half-day) event. Chapters that have organized multiple years have moved to a two-day event that includes product training and certifications (see pages 8- 9). Start small and grow the event.

Agendas should include time for NABIP-focused activities and discussing the value of membership. Be sure to focus on the value of the association for the agent and being involved with your local chapter.

Successful agendas do include both general session speakers for all attendees as well as breakout sessions.

Breakout sessions can be done in many ways, but most chapters have found that having two breakout tracks that focus on basic (new agents) and advanced (seasoned agents) topics is the most successful format for a summit.

## **Revenue Sharing**

If your chapter chooses to host an event with another, be very clear on expectations and outcomes. Equally sharing profits may not be in everyone's best interest if sponsorships raised and attendees are not equal. Consider drafting a "statement of understanding" that outlines expectations and profit sharing to avoid any confusion.

## **Marketing Pieces to Use**

You should always have marketing pieces to hand out or put at each attendees table. Use the pieces that you think will be the best received at the meeting. Here is a list of the pieces available that are specific to Medicare:

Medicare Matters - #180223

NABIP Building Blocks For Medicare - #160927

Path to Medicare - #170919

## Sample Questions for Carrier Panel

A very popular segment of the Medicare Summit is a carrier panel. A carrier panel is usually made up of 3-4 representatives from different carriers that market Medicare products in your area. This particular panel involves front line sales consulting – you will find that it is easier to get sales managers than the carrier top executives on your panel. Here are some sample questions that can be used in this setting – but please ask the most pertinent questions you can:

1. The components that make up a person's Medicare coverage, Parts A, B, C and D, and how they coordinate together, is very confusing to most consumers. In 3 minutes or less, how do you explain Medicare's 'alphabet soup' to your clients?
2. What 'pitfalls' or potential issues, problem areas or shortcomings do you point out to clients transitioning to Medicare?
3. One of the most confusing and problematic areas in the Medicare realm is prescription drug coverage. In 3 minutes or less, how do you explain Medicare Part D's 'doughnut hole' to your clients?
4. Ten years ago, when Medicare separated their drug coverage from medical coverage, the program was designed to help people who reach the catastrophic phase the most, paying 95% of their drug costs after an out of pocket max. Today, because of advances in high-cost specialty drugs, patients with arthritis, cancer, hepatitis C or other complex conditions may still have tens of thousands of dollars in cost-sharing. What advice can you give a client who approaches the donut hole or perhaps even the catastrophic drug phase? And what do you think the future holds for the Part D benefit and pharmaceutical companies?
5. Most Medicare Advantage HMO plans include a drug benefit, and monthly premiums are generally considerably less than Medi-Gap PPO plans. How do you explain the difference between HMO and PPO, and help clients choose? Or often asked, "which is better, HMO or PPO?"
6. What is the process for a client to change from a Med-Sup Plan to an Advantage Plan, and when can they do so? Conversely, what if they want to switch from an Advantage plan to a Supplement Plan?
7. Explain how it works if a client wants to change plans, or from one carrier to another, is there underwriting involved? Please include guidelines for Birthday Guaranteed Issue, time frame, or any applicable pre-existing conditions clauses.
8. When coming off an employer plan and the client is Medicare eligible, can the individual sign up for a Medi-Gap or Advantage plan on a guaranteed issue basis? If so, how long do they have to sign up? Also, what are the guidelines if there is a COBRA or an H.S.A involved?

9. Plan F, or Plan G or N - Other than the premium, what should the Agent consider when presenting these plans and what do you recommend?
10. Looking to the future, what changes are in store in the next 3-5 years for Medicare health insurance? Your answers might include budget cuts, provider reimbursement model issues or changes, possibly ACO's? And how will the job of the senior market agent change?

(Closing Question)

What advice would you give an agent entering the senior market now? Do you offer training or lead program? What other assistance do you provide agents? Take this opportunity to share with brokers anything they should know about your company.

## **Need Advice – Resources**

There are NABIP agents across the country that are willing to give you input on your upcoming events:

Dave Sherrill  
Sherrill Insurance Brokerage, Inc.  
407 CenterPointe Circle, Suite 1637  
Altamonte Springs, FL 32707  
Work Phone: 407-831-5000  
Email: dave@sherrillins.com

Yolanda Marie Webb  
Webb Insurance Solutions  
6117 Clover Ct.  
Chino, CA 91710  
Work Phone: 909-933-0891  
Email: yolandaw1@outlook.com

Margaret Evelyn Stedt C.S.A.  
Stedt Insurance Services  
486 Calle Amigo  
San Clemente, CA 92673-3003  
Work Phone: 949-492-8213  
Email: stedtins@cox.net

## **Resources to Offer During a Medicare Summit**

There is an e-package of documents available for Chapters hosting Medicare Summits. Among them are two flyers, one that summarizes Medicare Certification, the other that summarizes the REBC Designation (and the Medicare Certification is an elective of the program).

## **COMMUNICATION/FOLLOW UP FOR MEDICARE SUMMIT**

### **Summit Communication and Follow Up**

Within one week after the conclusion of the Medicare Summit, you should send out an email to all attendees. If you spoke at the meeting, reference that in your communication.

This is the very reason why you asked for the attendee's name, email address and phone number, among other things. Now you have their email address and phone number to communicate with them.

First, the email - here are some sample emails to use:

### **Sample Email to use for non-members attending a Medicare Summit sponsored by NABIP; Extend special \$50 off national dues offer**

**Subject Line: Special Offer to Join NABIP!**

**Good Afternoon Everyone:**

**Thank you for attending the Medicare Summit. I hope you found the time well invested.**

**I want to talk to you about joining NABIP. It's your support of the association that allows us to keep you informed and ready to meet the health, financial and retirement security needs of all Americans through education, advocacy, and professional development.**

**As someone who works in the Medicare-eligible market, you know too well the regulations and legislation of this market. It is essential to be up to date and fully informed on the latest happenings. That is where NABIP becomes your advocate. We know this market, and they know us. It takes years of hard work to become an effective advocate, and we have been extremely involved in the Medicare-eligible market for the past 15+ years.**

Because NABIP believes so strongly in the role of the producer, they are extending a special offer to you. Join NABIP by < > and get \$50 off the national dues!

Your NABIP membership has tremendous value - it is worth at least \$8,000/year. That's a return on investment of up to 20:1!

To join, click on the link: <https://NABIP.org/membership/join-now>.

You can also call me at 202-595-7564 or 317-507-6387, and I will work with you to complete the membership application over the phone.

Again, thank you for attending the Medicare Summit. I hope to see you at future NABIP events. Have a safe weekend!

**Sample Email to use for thanking those attending a Medicare Summit sponsored by NABIP – No Special Offer Extended**

**Subject Line: Thank You for Attending the Medicare Summit!**

**Good Morning Everyone:**

I want to take this opportunity to thank you for attending the 4th Annual Medicare Summit on March 20th. Attendance increases every year, which is a testimony to the quality speakers and topics addressed at this Summit. The Medicare-eligible market is growing, and that provides an opportunity for you to grow your business and help those in need of your services.

NABIP has been and will continue to be extremely committed to the Medicare-eligible market. NABIP has a Medicare Advisory Group that works on your behalf, as well as a Medicare Principals Council that is a consultative resource.

This market is heavily regulated and legislated (as you know), and as such, you need an advocate working for you – to keep you informed and educated on the latest news and requirements. NABIP is that advocate. Our stated mission is to advocate for our members, provide professional development, and deliver resources to promote excellence.

If you are a member, thank you. It's your support of the association that allows us to keep you informed and ready to meet the health, financial and retirement security needs of all Americans. If you are not a member, please consider joining. The value of being a member is calculated to be \$8,000 on an annual basis. That's a return on investment of 20:1!

If you have any questions or concerns, please contact me at my email ([btretter@NABIP.org](mailto:btretter@NABIP.org)) or my phone number (317-507-6387).

## **Sample emails to use for the Top Partners – Digital Media Campaign Program**

**Subject line: Changing The Way We Do Business - New Partnership Program**

**Good Morning < >:**

**In the past, our chapter would ask for your support throughout the year in the hope that you could help with sponsorship dollars. For many years this worked, but times have changed in our industry. With carriers tightening their belts and being more conscious of where they spend their money, we have developed a model where your marketing dollars can be more effective, and your return on investment will be greater than before.**

**This model has been tested by some NABIP chapters with successful results. It gives companies the ability to get in front of many producers at one time, and throughout the year, for one annual fee. You will become an “event partner” and as such you can be part of the event planning if you choose. We will promote who you are and what you do. We have also created a digital media stream and will set up a link to your website and all the events you have planned throughout the year. You will also be able to keep our members updated on anything you do such as producer training, webinars, product meetings, etc.**

**We have three levels of partnership, with varying levels of benefits. Other chapters have recently launched this concept with positive results. I would like to talk to you about these and see if any of them fit your needs.**

**It is my hope that you will join us as a new partner in a plan that is win/win for all of us.**

**Signed**

**< >**

After sending out the emails regarding their attendance at the Medicare Summit, here is a phone track to use when calling the non-members that recently attended the Medicare Summit:

**Sample phone track to a non-member who recently attended a NABIP event:**

Good Morning/Afternoon, may I speak with < >? This is Bob Tretter, VP of Marketing and Recruiting at the National Association of Benefits and Insurance Professionals. How are you today?

Thank you for attending the <Medicare Summit>. I hope you found the time was well invested. Events like that are just a part of what NABIP is all about. We keep you informed and ready to meet the health, financial and retirement security needs of all Americans through education, advocacy, and professional development.

I understand you are not a member, and that is the purpose of my call - I want to talk to you about joining NABIP.

Simply put, it's your support of the association that allows us to do what we do for our members every day. As someone who works in the <Medicare-eligible> market, it is essential to be up to date and fully informed on the latest happenings. That is where NABIP becomes your advocate.

There is strength in numbers, and we cannot accomplish what we have done and plan to do without the support of members nationwide. Will you join us and become a member of NABIP?

(If yes, then take down their information or guide them to the NABIP website)



## Final Thoughts

- The chapters that have had the most success are also the ones doing these the longest. One builds on another – don't just run one and be done!
- Don't be afraid to go after bigger sponsors by offering them a program such as the Digital Media Campaign. THINK BIG!
- The ultimate goal of the Medicare Summit is new members! The Medicare market is growing and as more producers enter it, the greater the need for an association that has your back.
- Keep good records. This means accurate records of all the attendees, including any carrier reps or exhibitors. You will want to include them in your Summit follow-up emails and phone calls. You will also need to keep these for historical and reference purposes as you run these annually.
- Reach out to those who have done these successfully over the past few years. That list was in the "Need Advice – Resource" section. They can help!

Medicare Summits are a great idea because:

- They attract non-member producers and carrier reps who we can now recruit to join NABIP.
- The chapter will gain recognition in the insurance community for being a resource for Medicare-related issues and concerns.
- The event itself is mostly profitable – that depends on the sponsorships you are able to get as well as paying attendees. Obviously keeping costs down by getting local experts to speak is also recommended.
- Did I mention new members and growth for the chapter?

If you have any questions, please contact Bob Tretter at [btretter@NABIP.org](mailto:btretter@NABIP.org), by phone at 202-595-7564; or Yolanda Webb at [yolandaw1@outlook.com](mailto:yolandaw1@outlook.com), by phone at 909-933-0891.