



There are **2** conference programs overlapping.  
A **1-day conference for agents** (Wednesday)...  
and a **2 ½ day Medicare Supplement Insurance** conference  
that begins on Wednesday and ends Friday.

## PROGRAM FOR THE 1-DAY AGENT CONFERENCE

Note: The 2 ½ Day Conference Program Begins on Page 2

### SUCCESSFUL MARKETING & SALE OF MEDICARE RELATED PRODUCTS

*a special 1-day program for producers - Wednesday, May, 16, 2012*

#### Wednesday, May 16, 2012

7:45 A.M. Registration Opens - National "Selling Medicare" Exhibit Hall Opens

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8:00 **Early Arrival Bonus Session: A Beginner's Guide To Marketing Yourself Online**

All you need is a computer and a willingness to try these simple-to-do tips to create a free Google presence.

Jesse Slome, Executive Director, American Association for Medicare Supplement Insurance, Los Angeles, CA

Jeff Cline, President, Insurance SEO and President 1-800-Medigap, Dallas, TX

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8:50 **Welcome - Explanation of CE Process For Qualifying Attendees**

Jesse Slome, Executive Director, American Association for Medicare Supplement Insurance, Los Angeles, CA

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9:00 **Selling Strategies (#1) - Market MedAdvantage - How To Succeed In A Competitive World (& Still Be Compliant)**

With 10,000 people turning 65 every day, here's how to successfully compete and secure MedAdvantage sales.

Adam Wasmund, Marketing Director, Jack Schroeder & Associates, Green Bay, WI

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9:15 **'Turning 65' Lead Generation - Secrets of Effective Direct Mail & Online Leads**

National experts share how to maximize your leads and get the best value for small and large budgets.

Richard Bufkin, President, Target Leads, Monterey, CA

Tina Hennessy, President, ARM Leads, Lewisville, TX

Tom Wicker, Health Plan One, Shelton, CT

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10:00 **The WOW Effect You Can Create Using Medicare.gov**

National Medicare sales expert shares the greatest free way to turn prospects into sales, cross sales and referrals.

Mike Smith, President, The Brokerage, Inc., Dallas, TX

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10:20 **Morning Break - Coffee With Exhibitors**

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10:35 **Selling Strategies (#2) - The Opportunity To Sell Part D Coverage To Individuals**

The opportunity to sell and cross-sell, Opening doors, Addressing "The Coverage Gap"

Michael Brady, Vice President, Merchants Benefits Administration, Scottsdale, AZ

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10:50 **Converting Medicare Leads to Appointments, Converting Appointments to Sales**

The nation's Lead Guru shares his 43+ years of proven ways to enjoy more success than you imagine.

Don Runge, "The Lead Guru", President, DMR Marketing Group, Inc., Plano, TX

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11:30 **Selling Strategies (#3) - The Easy Cross-Sell To Medicare Clients, "LTC Lite" For Those With LTC Buyer's Remorse**

A new simple solution that's inexpensive, compliments gaps and targets seniors who waited too long for LTC insurance.

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- 11:45 Tapping Into The Growing Hispanic Marketplace for Medicare Products**  
By 2019, the 65 plus Hispanic population will be the largest racial/ethnic minority in this age group.  
Brian Schroeder, CEO & Adam Wasmund, Marketing Director, Jack Schroeder & Associates, Green Bay, WI
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- 12:10 P.M. Luncheon - Sponsored by Continental Life, an Aetna company, Ty Wooldridge, President and CEO, Continental Life**  
**The 3 Greatest Sales & Appointment-Setting Strategies From America's Lead Guru**  
Don Runge, "The Lead Guru", President, DMR Marketing Group, Inc., Plano, TX  
**Medicare Changes Pre- & Post-Election: The Latest From Washington D.C. - What It All Means For Your Future**  
Mike Colliflower, Counsel, Aetna Senior Supplemental Insurance, Brentwood, TN  
Melissa Rewinkel, Vice President, Federal Government Affairs, Mutual of Omaha  
Susan Morisato, President, Insurance Solutions, United Healthcare Medicare & Retirement, Minnetonka, MN
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- 2:20 Selling Strategies (#4) - What You & Your Senior Clients Don't Know About Reverse Mortgages (But Should!)**  
After 700,000 reverse mortgages discover ways to help seniors access funds for health, insurance and life.  
Tom Dickson, National Intermediary Sales Leader, MetLife Bank, N.A.
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- 2:35 Med Supp Underwriting: Comparing "Sweet Spots" - Avoiding Submission Problems That Delay Comp**  
Understand different health conditions acceptable to insurers + most common mistakes that hold up apps and your cash.  
Victor Castellanos, Chief Marketing Office, Insurance Administration Solutions  
Tara Ulrich, Marketing Manager, Medicare Supplement Sales, Producers XL, Salina, KS
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- 3:10 Selling Strategies (#5) Secrets To Selling Final Expense In The Medicare Marketplace**  
Discover how to generate a significant income stream by selling a product for the masses.  
Jason McClellan, President & CEO, Insurance Advisors Direct, Novi, MI
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- 3:25 Final Break to meet with Exhibitors**
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- 3:45 Million Dollar Med Sup Roundtable: National Sales Leaders Share Strategies - Answer Questions**  
We've saved the best for last ... and by best, we mean our panel consists of three of the nation's top Med Supp agents whose combined placed premium exceeds **\$1 million annually**. Hear what they do to get prospects, set appointments, make winning presentations, get referrals. Plus, plenty of time to answer audience questions.  
Moderated by Marty Martin, Vice President Business Development, Insurance Solutions, UnitedHealthcare, PA
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- 4:45 Program Concludes - Exhibit Booths Will Remain Open until 5:30 PM**
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**PROGRAM FOR THE 2 ½ - DAY  
MEDICARE SUPPLEMENT CONFERENCE**

**Note: Attendees May Also Participate in the Wed. AM Sessions**

**ISSUES & TRENDS IN MEDICARE SUPPLEMENT INSURANCE**

*the 3-day national forum for professionals who market, sell, price, administer and support Med Supp insurance*

**Wednesday, May 16, 2012**

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| <b>8:00 AM</b> | <b>Ballroom Level<br/>Overture Foyer</b> | <b>Registration Desk Opens<br/>Exhibit Area Opens</b>   |
|                | <b>Concerto A</b>                        | Registrants arriving early are invited to attend the agent-oriented sessions as well as the luncheon. |
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| <b>2:30 - 3:45 PM</b> | <b>Concerto B</b> | <b>The Future of Med Supp Is Here - What Does It Mean to You?</b><br>A comprehensive analysis of the marketplace and future projections for growth specific to Med Supp plans. How changes in MedAdvantage will impact Med Supp markets and where will companies find the most profitable broad and niche opportunities.<br><b>Doug Feekin, ASA, MAAA, Principal and Consulting Actuary, CSG Actuarial, LLC., Omaha, NE</b><br><b>Julian Whitekus, FSA, MAAA, Vice President, Hannover Re, Orlando, FL</b> |
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	<b>Concerto C</b>	<b>New to Medicare: Bringing the Boomers on Board</b> It's not just about "turning 65" any more. The Boomers want information and enrollment options on <i>their</i> terms. Successful marketers need to start early and plan to stay the course past age 65. <b>Warren Hunter, Chairman, DMW Direct, Chesterbrook, PA</b>
<b>4:00 - 5:15 PM</b>	<b>Concerto B</b>	<b>Change Your Agents Mindset About Leads For Better Results</b> Discover how to effectively train your producers to use leads as a marketing tool -- not a selling tool -- and achieve better sales and bottom-line results. <b>Don Runge, The Lead Guru, President, DMR Marketing, Inc., Plano, TX</b>
	<b>Concerto C</b>	<b>What Can We Do As An Industry To Be Heard</b> A look at the Medicare-related battles won to date and those still pending. Those advancing the industry explain what's taking place and what it means to you. <b>Betsy Pelovitz, Vice President, Product Policy, America's Health Insurance Plans, Washington, D.C.</b> <b>Melissa Rewinkle, Vice President, Federal Government Affairs, Mutual of Omaha, Washington, D.C.</b>
<b>5:45 - 7:00 PM</b>	<b>Upper Pool</b>	<b>Welcoming Reception</b> Then enjoy dinner on your own. The hotel is a short cab ride from the famous South Beach.

## Thursday, May 17, 2012

<b>7:30 AM</b> Note Food Service ends at 8:00 AM	<b>Symphony III / IV</b>	<b>Breakfast - Join All Conference Attendees for a plated breakfast</b>  <b>Lessons Learned and the New Consumer Landscape: Implications For 2012 &amp; Beyond</b> The Senior Director for AARP's Medicare Supplement and Medicare Advantage programs sorts out the larger implications of everything taking place and lessons learned and his perspective on the changing environment and consumer base with an eye to how businesses will need to change and adapt to the new reality. <b>Douglas Armstrong, Senior Director, Medicare Supplement /Med Adv. Products, AARP, Washington, D.C.</b>
<b>9:15 - 10:30</b>	<b>Concerto A / B</b>	<b>Capital Insights: The Latest Issues, News &amp; Changes From D.C.</b> From the Super Committee to Federal regulators and the NAIC, Medigap is a hot topic . What's being considered? What's most likely to happen? What Federal changes will impact the Medicare Supplement insurance marketplace? <b>Dotti Outland, Regulatory Affairs, UnitedHealth Group, Horsham, PA</b> <b>Bill Schiffbauer, Esq., Schiffbauer Law Office, Washington, D.C.</b>
	<b>Concerto C</b>	<b>Latest Best Practices For Consumer Lead Generation Programs</b> Maximizing large-scale direct mail programs and Internet leads programs for your agents. <b>Richard Bufkin, President, Target Leads, Carmel, CA</b> <b>Tom Wicker, President, Health Plan One Medicare Solutions, Shelton, CT</b>
<b>10:30 - 10:45</b>	<b>Overture Foyer</b>	<b>Coffee Break With Exhibitors</b>
<b>10:45 - 12:00</b>	<b>Concerto A</b>	<b>Start Selling Med Supp Insurance; A New Entrant's Experience</b> Top industry execs share what an insurer needs to know to successfully launch in a competitive environment.   Recent new-launch case histories: what worked and was learn; what needed to work better. One session with 3 experienced pros in Med Supp Pricing, Underwriting and Administration, Marketing & Sales, Reinsurance. <b>Victor Castellanos, Sr VP, Chief Marketing Officer, Insurance Administrative Solutions, Orlando, FL</b> <b>Bryan Neary, ASA, MAAA, Principal and Consulting Actuary, CSG Actuarial, LLC, Omaha, NE</b> <b>Samuel Halpern, Director of Internet Marketing, Senior Market Sales, Omaha, NE</b>
	<b>Concerto B</b>	<b>The Rate Filing Environment – Florida Regulator &amp; Senior Reinsurer Share Perspectives</b>  Florida regulator discusses how to improve rate filing submissions along with trends in the Florida market. Key reinsurer shares perspective on what lies ahead in terms of state attitudes. Will sane premiums be the norm going forward? What about companies looking to enter; willt hey repeat mistakes and once again change the competitive landscape? <b>Robert Himmelstein, ASA, MAAA, Second Vice President, Gen Re, Stamford, CT</b> <b>Linda Ziegler, ASA, MAAA, FLMI, Actuary, Florida Office of Insurance Regulation, Tallahassee, FL</b> <b>Michael Weilant, FSA, MAAA, Principal and Consulting Actuary, Milliman, Inc., Tampa, FL</b>
	<b>Concerto C</b>	<b>What Entices Producers To Sell Your Product: A Top Producers Panel</b> Top Medicare Supplement insurance producers share what makes them successful, what they look for from an insurer and distributor, and answer questions from those seeking to know what top producers look for. <b>Marty Martin, UnitedHealth Group, Horsham, PA</b>
<b>12:15 - 1:45</b>	<b>Symphony III / IV</b>	<b>Luncheon The New Medicare Customer Conversation - Sponsor: KBM Group</b> Shifting consumer demographics have changed the Med Supp landscape forever and the ability to understand new purchasing habits and the move from offline to online marketing will separate winners from losers over the next few years.

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2:00 - 3:15	Concerto A	<b>What's The N.A.I.C. &amp; CMS Up To?</b> Changes aplenty for Medicare Supplement plans at the NAIC and CMS. Experts share the latest and answer your questions about what's in store. <b>Dotti Outland, Regulatory Affairs, UnitedHealth Group, Horsham, PA</b> <b>Betsy Pelovitz, Vice President, Product Policy, America's Health Insurance Plans, Washington, D.C.</b> <b>Guenther Ruch, State of Wisconsin, Office of the Commissioner of Insurance, Madison, WI</b>
	Concerto B	<b>How Companies Underwrite: Results of Latest National Study</b> Analysis of industry data. How companies underwrite different conditions and do the differences really matter? <b>Bryan Neary, ASA, MAAA, Principal and Consulting Actuary, CSG Actuarial, LLC., Omaha, NE</b> <b>Jill Burns, FSA, MAAA, Chief Actuary, Medico Insurance Company, Omaha, NE</b>
	Concerto C	<b>Using The Latest Technology For Increased Effectiveness &amp; Profit</b> From a national Field Marketing Organization and leader in technological applications designed to support producer effectiveness and productivity. From lead management to agent productivity tools – equipping agents to do business using Call, Click, Mail or Meet. Lessons learned on the way of adapting to greater E-fficiency. <b>Dwane McFerrin, Vice President, Medicare Solutions, Senior Market Sales, Omaha, NE</b> <b>Samuel Halpern, Director of Internet Marketing, Senior Market Sales, Omaha, NE</b>
3:15 - 3:45	Overture Foyer	<b>Coffee Break With Exhibitors</b>
3:45 - 5:00	Concerto A	<b>Revolution or Evolution: What's Happening Next For MedAdv and Prescription Drug Plans</b> What's happening and what's next for Medicare Advantage and Prescription Drug Plans? How might their challenges impact MA, PDP, and Medigap markets? <b>Pat Dunks, FSA, MAAA, Principal and Consulting Actuary, Milliman, Inc., Brookfield, WI</b> <b>Scott Bentley, FAS, MAAA, Principal, Milliman, Inc., Milwaukee, WI</b>
	Concerto B	<b>Customer Analytics: Medigap's Most Valuable Geek Squad</b> Understanding today's prospect for Medicare products has never been more important. Get the edge on your competition by knowing what data is vital and what demographic, psychographic, lifestyle and life-stage indicators tell who to target, sell to and retain.  <b>Lindsay Resnick,,Chief Marketing Officer, KBM Group: Health Services, Chicago, IL</b> <b>Abigail Doolittle, PhD, Vice President, Marketing Science, KBM Group: Health Services, Chicago, IL</b>
	Concerto C	<b>Best Uses Of Technology To Recruit, Train &amp; Motivate Producers</b> High-growth agencies are successful recruiters of producers. What practices are <b>Marty Martin, UnitedHealth Group, Horsham, PA</b> <b>Bennetta Slaughter, CEO, Insurance Media Services, Memphis, TN</b>
5:30 - 7:00	Symphony III / IV	<b>Networking Reception</b>

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## Friday, May 18, 2012

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7:30 AM	Symphony III / IV	<b>Breakfast</b>
8:00 AM	program begins	<b>Welcome and Introductions</b> <b>Carl Fischer, Vice President, Sales, CHCS Services, Inc., Dallas, TX</b>  <b>Highlights From The Gen Re Medicare Supplement Market Survey</b> Key highlights from the just-released analysis of the Med Supp market including details on plan types sold, business performance, underwriting tools used, product experience and distribution. <b>Stacy Varney, Vice President, Marketing &amp; Account Management, Gen Re, Portland ME</b>  <b>How Accountable Care Organizations May Impact Future Med Supp Business Profitability</b> ACOs officially started 1/1 of this year. Understand what they are and why they could significantly impact the Medigap landscape. What ACOs could mean to pricing, new market launches or plan expansion. <b>Glen Champlin, Vice President, Business Development, Olympian Health Partners, Bellingham, WA</b>
9:15 - 10:30	Concerto A	<b>How To Make Really Effective Use Of Competitive Rate Information</b> Information has little value unless you know how to use it. Two national pricing leaders explain how to use competitive Med Supp rate information to evaluate overall rate competitiveness plus how a carrier's actual or proposed rate structure is aligned with both competition and risk levels.

Dawn Helwig, FSA, MAAA, Principall and Consulting Actuary, Milliman, Inc, Chicago, IL  
Ken Clark, FSA, MAAA, Principal, Milliman, Inc., Chicago, IL

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**Concerto B**

**Selling To The Hispanic Market: A Guide For Distributors**

Learn what's worked and what mistakes to avoid from the nation's leading Medigap insurer and a leading marketing organization who have successfully built operations to capture increased insurance sales from the burgeoning Hispanic marketplace.

**Marty Martin, UnitedHealth Group, Horsham, PA**

**Brian Schroeder, Chairman / CEO, Jack Schroeder and Associates, Green Bay, WI**

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**Concerto C**

**MEDIGAP CEO FORUM: CEOs and CFOs Share Outlook, Concerns, Opportunities**

CEOs and CFOs for Medicare Supplement product lines gather to discuss both the positives and negatives of offering Med Supp; share thoughts regarding changes and opportunities. More than just an opportunity to listen, a chance to ask questions

**Julian Whitekus, FSA, MAAA, Vice President, Hannover Re, Orlando, FL**

**Billy Hill, Director of Special Projects, Amerilife, Clearwater, FL**

**Brad Wolfram, President, Great American Supplemental Benefits Group, Austin, TX**

**Gary Bryant, President, Gary W Bryant Consulting, Longwood, FL**

**Ty Woolridge, President and CEO, Continental Life, Brentwood, TN**

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**10:30 – 10:45**

**Overture Foyer**

**Coffee Break**

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**10:45 - 12:00**

**Concerto A**

**State Issues: The Latest News & What Lies Ahead**

Our experts are part of every industry regulatory meeting so they know the latest as well as what's likely to occur on significant issues from Guaranteed Issue to dealing with Under 65 Medicare eligibles.

**Dotti Outland, Regulatory Affairs, UnitedHealth Group, Horsham, PA**

**Betsy Pelovitz, Vice President, Product Policy, America's Health Insurance Plans, Washington, D.C.**

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**Concerto B**

**Setting Up A Successful Call Center To Handle Internet Leads**

What are the best practices to successfully convert Internet (or mass mail) leads into sales. How do you create a successful call center from scratch and build it into a successful operation on a national or regional basis.

**Jeff Cline, Founder, 1-800-MEDIGAP, Rockwall, TX**

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**Concerto C**

**Competing Against The High Cost Of Zero Premium Products**

An analysis of data and marketing approaches that enables companies to effectively compete with the attractiveness of a "perceived zero cost" offering.

**Herb Haigh, President, AmeriPlus Select Services, Clearwater, FL**

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