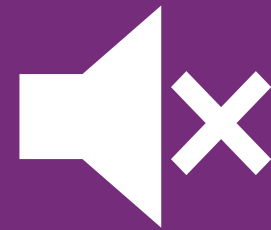


LEAD | STAR |



COMPLIANT LEADS. CLEAR GUIDANCE. ONE PLATFORM.

Welcome!



Audio and Video capabilities have been disabled for attendees



Use the Q&A function to ask questions or share comments

If your question is not answered live, we will follow-up with a response via email



This session is being recorded

The recording will be shared next week

Our Panel



Robert W. Bache

Title Founder & Chief of Sales, Senior
Healthcare Direct

Robert.Bache@srhealthcaredirect.com

Direct: (727) 643-0219

Robert Bache is the Founder and Chief of Sales of Senior Healthcare Direct, an Amerilife company.

Robert aka "MedicareBob" has been awarded with several honors, based on Medicare sales agency production, business operations and is one of the leader's in the Medicare insurance marketplace.

Personally, Robert is husband to Marlee and Father to Lukas (age 12) and Austin (age 10). Involved in his community and church, Robert is focused on his family and running an ethical business.

Our Panel



Bill Somerville

Founder, PolicyBind

bill@policybind.com

561-287-7501 ext 800

Bill Somerville is the Founder of PolicyBind, a digital marketing agency specializing in all insurance verticals. He started in the industry as a life/health agent for Mutual of Omaha in 2008 before he realized the immense opportunity that was present in the lead generation side of the business.

He completely switched over to lead generation-consumer acquisition in 2014 when he joined Datalot and worked on the lead distribution side of the business for P&C, Health, Medicare, and Life insurance verticals. In 2019 he moved back into generating leads through a series of owned and operated sites and forms through social media traffic sources in the Mortgage/Refi space, and eventually moving fully back into his favorite verticals: Insurance.

PolicyBind generates thousands of inbound calls and leads on a daily basis of consumers looking to speak to agents about their insurance options.

He and his team have continued to follow the organization's mission of "Simplifying the online insurance shopping process for consumers everywhere".

Our Panel



Jason Levine

Director of Operations,
MyHealthAngel Insurance

jlevine@myhealthangel.com

Phone [877.310.0510](tel:877.310.0510)

Day to day operations manager of MyHealthAngel Insurance Agency. Over 12 years in the Medicare industry offering various direct to consumer products, exclusively over the phone.

Our Panel



Dale Wondisford

Owner of Medigap
Supplement Headquarters
dale@medicareplans4us.com

Dale Wondisford, independent insurance agent since 2008. Specializing in helping Medicare eligible beneficiaries with health plan options. Currently, reside in the Orlando area with my wife Val and our 3 kids. I have had a very success business in the Medicare space. I came to MCC agency a couple of years ago and with their support have grown the business year after year. I care a lot about my clients and make sure they are getting the most out of there Medicare plan and do it compliantly.

Our Panel



Carole Gervasi

VP Publisher Partnerships,

Fluent Sales Solutions

Email cgervasi@fluentco.com

Carole Gervasi is a passionate, experienced leader & team player in the Lead Generation & Pay Per Call Industries. Her career spans over 2 decades with core expertise in customer acquisition, launching new products, partnership and publisher marketing, and maximizing employee potential. She elevates the conversation, brings new ideas to the industry, and is always willing to offer knowledge and advice wherever she can add value. Currently working as VP of Publisher Partnerships at Fluent, her contributions have already made an impact in their new division, Fluent Sales Solutions.

Our Panel



Don Calamaro

TSVP, Business Development,
Fluent Sales Solutions

DCalamaro@fluentco.com

Don Calamaro is the SVP of Sales and Business Development at Fluent, one of the country's leading performance marketing companies. During a 30 year media career, Don has created value for companies utilizing in print, direct mail, email and digital, driving performance for Walmart, State Farm, IBM, Nationwide, GEICO, P&G, and others. He has extensive experience in digital media start-up/venture world and has built products and platforms to serve both B2B and B2C companies.

Training Session



Social Media Ad - Inbound Calls English & Spanish

- Click to Call
- Direct Mail
- Search
- Social

MEDICARE BENEFICIARIES!
INFLATION RUINING YOUR DREAMS OF RETIREMENT?
Call now to speak to a licensed insurance agent (888) 295-6123 | TTY: 711




MEDICARE BENEFICIARIES!
INFLATION RUINING YOUR DREAM RETIREMENT?

Call now to speak to a licensed insurance agent
(888) 295-6123 | TTY: 711

We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact Medicare.gov or 1-800-MEDICARE to get information on all of your options.

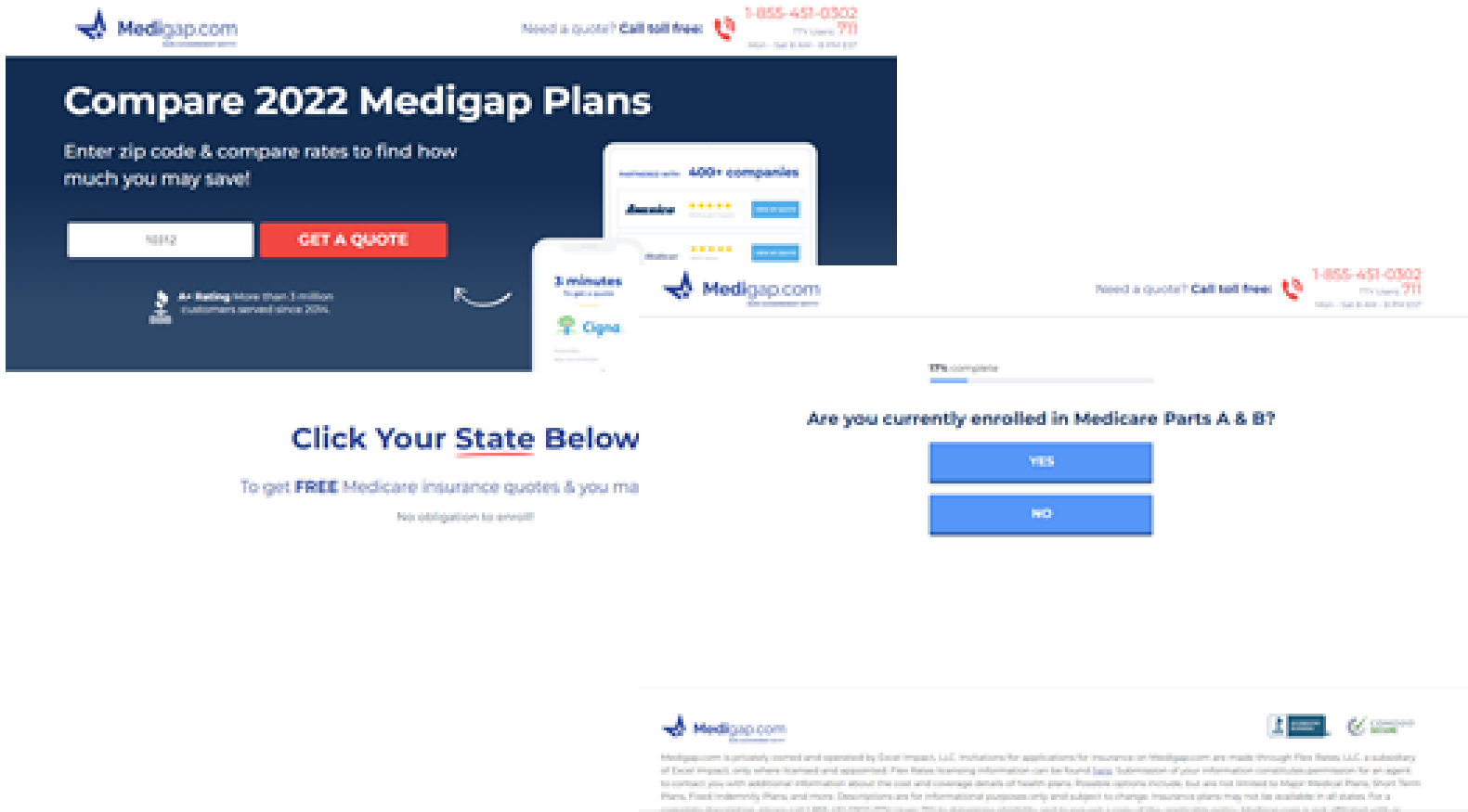
¿Estás en Medicare? Si es así, ¿sabías que puedes calificar para acceder a un plan con cobertura en servicios dentales? Llámanos ahora y habla con uno de nuestros agentes autorizados.



DIAL +1 (800) 877-8339
Averigua si calificas con una simple llamada

Call now

Lead Generation Landing Pages



Medigap.com

Need a quote? Call toll free: 1-855-451-0302
TTY: 711
Hours: 8 a.m. - 8 p.m. EST

Compare 2022 Medigap Plans

Enter zip code & compare rates to find how much you may save!

10112 GET A QUOTE

400+ companies

3 minutes to get a quote

AA Rating more than 3 million customers served since 2014

Medigap.com

Need a quote? Call toll free: 1-855-451-0302
TTY: 711
Hours: 8 a.m. - 8 p.m. EST

33% complete

Click Your State Below

To get **FREE** Medicare insurance quotes & you may be eligible for a discount

No obligation to enroll

Are you currently enrolled in Medicare Parts A & B?

YES

NO

Medigap.com

Medigap.com is privately owned and operated by Exact Impact, LLC. Inquiries for applications for insurance on Medigap.com are made through First Steps LLC, a subsidiary of Exact Impact, only where licensed and supported. First Steps Insurance information can be found here. Submission of your information constitutes permission for an agent to contact you with additional information about the cost and coverage details of health plans. Possible options include, but are not limited to: Major Medical Plans, Short Term Plans, Fixed Indemnity Plans, and more. Descriptions are for informational purposes only and subject to change. Insurance plans may not be available in all states. For a complete list of available plans, visit our website. We are not a broker or agent. We are a service provider. We are not a broker or agent. We are a service provider. We are not a broker or agent. We are a service provider.

- TCPA compliant leads – Jornaya integrated
- Real time exclusive & Aged



MyHealthAngel

Direct Mail - Call Handling Guidelines

Direct Mail Examples

Postcard Front

Call Toll Free:
to Speak with a Licensed Insurance Agent

Hours of Operation:
Monday through Friday 8:00 a.m. - 9:00 p.m. EST

ADVERTISEMENT - NO GOVERNMENT AFFILIATION



Postcard Back

MEDICARE ADVANTAGE PLAN OPTIONS FOR 2023

IMPORTANT INFORMATION ABOUT YOUR MEDICARE HEALTH PLAN OPTIONS

| | |
|--|----------|
| 1. STATUS: | |
| CALL 1-800-XXX-XXXX (TTY:711) TO SEE IF YOU ARE ELIGIBLE | |
| 2. MEDICARE RECIPIENT: | 3. DATE: |
| FIRST LAST | 1/4/2099 |

**WE HAVE INFORMATION ABOUT YOUR MEDICARE PLAN OPTIONS
YOUR ATTENTION IS REQUESTED**

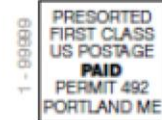
SeniorAngel
SeniorAngel.com

A non-government entity powered by SeniorAngel a health insurance agency



FIRST LAST
123 MAIN ST
MYTOWN ST 12345-6789

This is an advertisement. Outside the Medicare Annual Enrollment Period, beneficiaries Enrollment in the described plan type may be limited to certain times of the year unless you qualify for a special enrollment period. A licensed insurance agent can help you determine whether you are eligible. Plan Availability and benefit availability varies by carrier and by region and state. Callers will be directed to a licensed insurance agent with a third-party partner of SeniorAngel who can provide more information about Medicare plans offered by one or several Medicare-contracted carrier(s). This is a solicitation to sell insurance, and is coming from a licensed health insurance agency, and not affiliated or endorsed by the government or federal Medicare program. This information is not a complete description of benefits. Premiums, copayments, coinsurance and deductibles may still apply. Plans are insured or covered by a Medicare Advantage organization with a Medicare contract and/or a Medicare-approved Part D sponsor. Enrollment in the plan depends on the plan's contract renewal with Medicare. We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact Medicare.gov or 1-800-MEDICARE (24 hours a day/7 days a week) to get information on all of your options. Medicare has neither reviewed nor endorsed the information contained in this advertisement. This is an advertisement-No Government Affiliation. SeniorAngel 4801 Linton Ave #11 Delray Beach FL 33445.



1-

Follow These Steps On Every Call To Ensure Success!

Step 1: Introduction & Greeting

Step 2: Get Control & Set Expectations

Step 3: Verify Eligibility

Step 4: Look Up Plan

Step 5: Plan Comparison

Step 6: Enroll & Close

Introduction & Greeting

Agent: Hello, thank you for calling {Agency Name}. I presume you're calling because you received one of our postcards in the mail about your Medicare options? ; *[Pause for Agreement]*

TPMO Disclaimer

Agent: Great, before I get into any details, CMS requires that I read you a Brief Disclaimer:

“We do not offer every plan available in your area. Any information we provide is limited to those plans we do offer in your area. Please contact Medicare.gov or 1-800 Medicare to get information on all your options. Additionally, I want you to know that this call is being recorded for quality and training purposes. Is that ok with you?”

Agent: Great, My Name is [Agent Name] I'm a licensed insurance agent with {Agency Name}

We sent you this Postcard so we can let you know about new plans that may be available in your area Most people like to save money; I suppose if we could find you a plan that offers you

Additional benefits at no cost to you, You would be interested, Correct? *[Pause for Agreement]*

YES: Continue

Agent: Great, and just to confirm, you are currently enrolled in Medicare; Is that correct? *[Pause for Agreement]* *If Caller is*

Unsure: Ask Additional Questions: This would be the Red, White, and Blue card?

Agent: Do you make your own healthcare decisions? (must be yes)

Do's & Dont's of Introduction & Greeting

DO:

Mention source of the call on intro.

State your name and agency name.

DONT:

Speak over the caller, listen to their needs

Ask any open-ended questions

Open Ended Questions to Avoid:

How Can I Help You today?

What do (or don't) you like in your current plan? (You will identify holes in their current coverage)

Do you know your current coverage? (you will uncover during course of call)

Do you know if you have Medicaid or Extra Help? (you will uncover during course of call)

Set Expectations & Get Control

Agent: Excellent:

Now My Job is to make sure we get you the best coverage possible

During this call, I will ask you some questions and we will collect your name, zip code, and DOB to view the plans in your area

Most important; I want to understand your needs and your situation

Then we'll find the best plan available that meets your needs.
Does that make sense? [Pause for Agreement]

Agent: Great; In order to confirm your eligibility, I need to get some basic information from you.

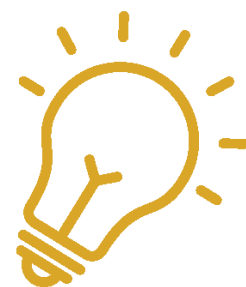
1. Obtain Full Name

2. Obtain Zip Code

3. Obtain DOB

4. Obtain MBI (or social security number if necessary)

Agent: Thank you for that information. And, do I have your permission to check your eligibility with Medicare?



Agent Tip: Asking a caller if they know their current coverage can be detrimental to the conversation. You have the necessary tools and information to get the accurate plan information so you can best help the caller

Verify Eligibility

Top Tools to Check Eligibility:

1. Marx
2. Cigna for Brokers
3. UHC - Jarvis
4. Humana - Vantage
5. Aetna Think Agent
6. Anthem mProducer
7. Enrollment platforms (if applicable)

While Verifying Coverage

1. Read Scope of appointment
2. Read the Health insurance information disclaimer

Look Up Plan

Agent: Thank you. I was able to pull up your current coverage.

1. Inform the caller that you have identified their coverage (include the carrier name and plan type)
2. Inform the caller if they have any LIS or Medicaid that will qualify them for more benefits.
3. Check for election period (not applicable during AEP)
4. Let them know that there are many plans in their area.

Agent: Great news! There are many plans available that offer great benefits. What I want to do next is make sure your doctors and prescriptions will be covered under these plans. Then we can look at the plans that fit your needs compared to your current coverage and go from there. Does that sound good to you?

Plan Comparison

1. Obtain primary doctor information. Obtain any specialists or services and check networks.
2. Offer to check prescription coverage. If you do not go over specific medications, make sure to read the Rx Tiers from the Summary of Benefits during the comparison
3. Ask the caller if there are any specific benefits that they are interested in.

Compare current coverage to other plans in the area. If it is determined that there is a new plan for the caller to join, move to close.

Enroll & Close

Agent: Based on everything we have covered, it appears that this plan I found {plan name} is a great fit for you. Are you ready to get enrolled in this plan?

- Complete Enrollment
- Post Enrollment

Agent: Before I let you go, I want to make sure you have all of my information. Do you have a pen and paper handy?

My Name is _____

The Name of the agency is _____ (if applicable)

The best number to reach me is _____

The Carrier/Plan you enrolled in is _____ and will be effective on _____

If you have any questions please feel free to contact me any time. And remember, you do not need to enroll in any more plans, you are all set!

Thank you for your time/business and have a great day!!

Questions?



MyHealthAngel



COMPLIANT LEADS. CLEAR GUIDANCE. ONE PLATFORM.

THANK YOU!

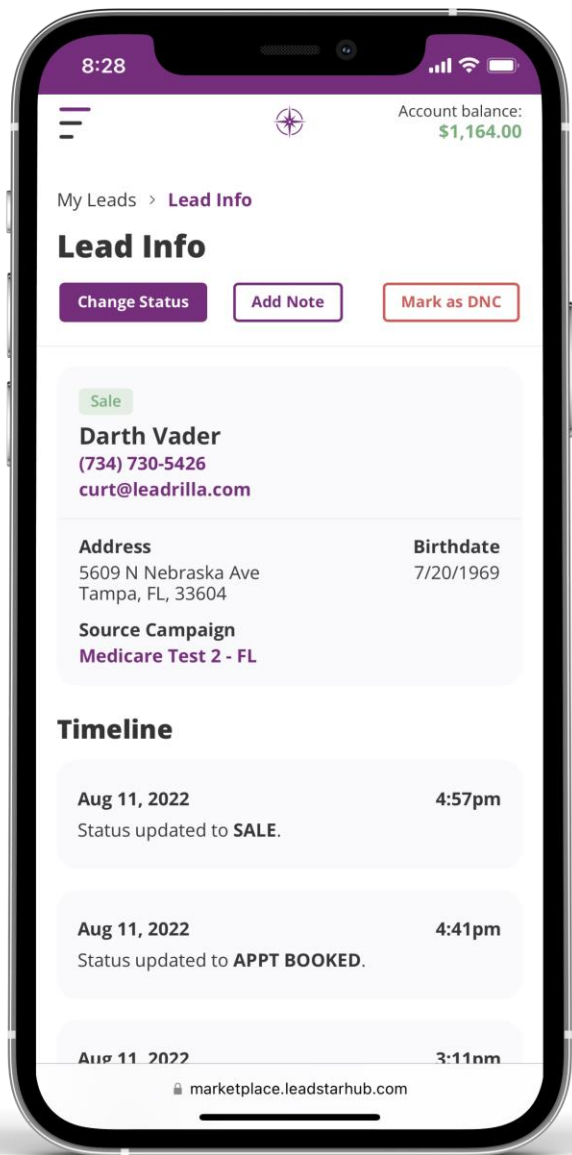
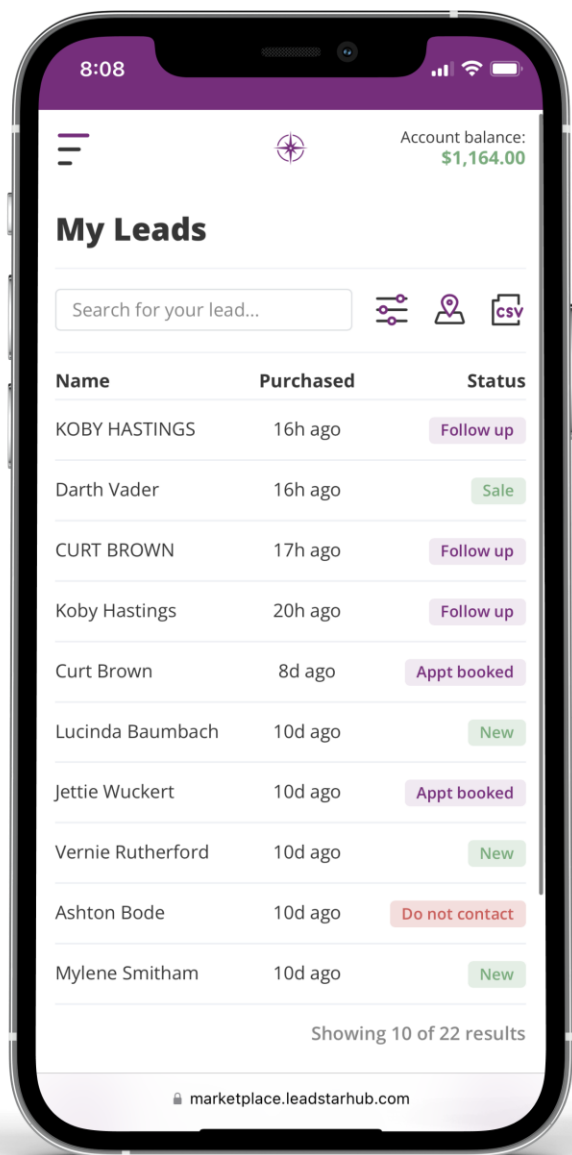
Feedback or ideas for future topics?

Email us at LeadStar@LeadStarHub.com

Join us for our next session more details coming soon!

A **self-serve platform** that allows agents to acquire new customers at scale.

- TCPA- and CMS-**COMPLIANT** leads for **MEDICARE & FE**, plus other products (*UNDERWRITTEN LIFE, ANNUITIES*) post-pilot
- **Aggragated purchase power** provides best **possible lead price** for individual agents
- **Inbound calls** on your schedule
- **Real-time** exclusive data leads
- An **aged lead** marketplace
- Integrated **CRM**
- Two-way **sms notification** for real-time exclusive data leads
- **Self-service campaign** set-up & management tools
- **CMS-required** inbound **call recording & storage**



PILOT TIMELINE

