

Medicare 101 Platform



Medicare 101 is a proven marketing system that will generate a continuous stream of qualified prospects for your firm at a low client-acquisition cost. This system is comprised of monthly educational workshops that are marketed through digital marketing, social media, and other channels. The Medicare Platform also provides training sessions to support and share best practices on how to conduct a successful educational workshop and appointments.

What comes with the Medicare 101 Platform?

- **Marketing Coordinator**
- **Medicare 101 Marketing Channels**
- **Protected Territory**

Marketing Coordinator

Our advisors receive a dedicated Marketing Coordinator who will work closely with you to get you from point A to point Z. Their primary objective is to ensure you are ready for your first workshop and successfully capturing leads.

Your Marketing Coordinator:

- Does the necessary market research on your territory to find the best strategy for your first campaign.
- Pulls venues together that will attract the most registrants.
- Schedules your workshops directly with your venues.
- Coordinates with mail house and marketing department to set your campaigns up.
- Walks you through the lead tracking and outreach best practices to follow before and after your workshops.
- Monitors your campaign, actively working on any practical changes that may need to be made to increase registrations.
- Stays in communication with you to see where our teams can be of assistance.
- Schedules your workshop training and coaching sessions with your Medicare Mentors.
- Plans subsequent campaigns based on your input, experience, and reassessments of ongoing campaigns.



Medicare 101 Marketing Channels

Our Medicare 101 Platform offers two ways for you to reach and meet your prospects: in-person and virtual workshops. Marketing for your in-person workshops will include **direct mail marketing** and/or **digital ad campaigns**, while your virtual workshops will be marketed through **digital ad campaigns**. We handle the marketing channels to allow advisors to focus on their workshop preparation and landing the appointment.

For each marketing channel, we:

- **Direct Mail** -
 - Create and design direct mail pieces based on your marketing territory using nationwide tested templates.
 - Oversee the coordination of direct mail orders and deliveries with our mail house partner.
 - Create and design social media ad campaigns based on your targeted area using nationwide tested templates.
 - Manage and monitor ad campaigns to maximize registrations.
 - Provide workshop materials and handouts that the advisor can utilize before and after the workshop.
 - Coordinate with our Medicare Mentors to provide coaching and training on getting prospects to commit to an appointment.

- **Digital Campaigns** -
 - Create and design social media ad campaigns based on your targeted area using nationwide tested templates.
 - Manage and monitor ad campaigns to maximize registrations.
 - Provide webinar platform, with training and support to make certain the advisor is prepared for their virtual workshops.
 - Create and upload virtual workshop materials to webinar platform to minimize compatibility issues and allow the advisor to focus on the workshop.
 - Coordinate with our Medicare Mentors to provide coaching and training on how to book an appointment.



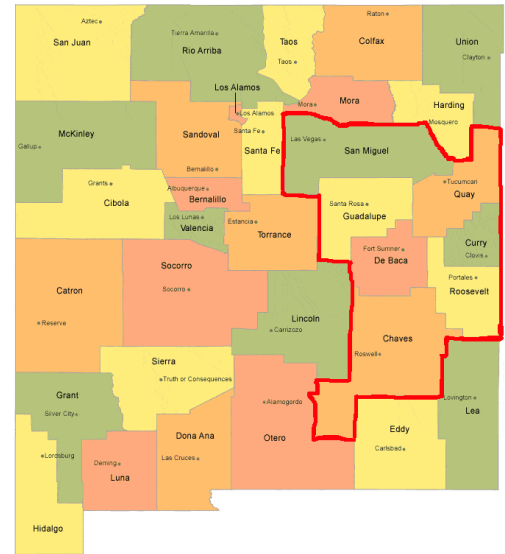
Protected Territory

With Medicare 101, we set an ideal marketing territory/targeting area using your firm's location, your state appointments, the type of marketing you will be conducting and your desired target market.

Using six-months of data of prospects turning 65 in the area, we set your mailer territory so there is a pool of at least 2,000 prospects per month.

We determine the parameters of your targeting area for your digital marketing using a similar model as we use for our mailer territory. Due to the flexible nature of digital marketing, however, we are not confined to your backyard allowing us to optimize each campaign to ensure a healthy potential reach.

****Note: Your mailer territory does not equal your digital targeting area.****



Medicare 101 Platform Cost

Access to the Medicare 101 Platform is covered through a \$500 monthly platform fee*. Your platform fee is billed monthly starting your first month of marketing. However, your *Welcome Email* sent by your Marketing Coordinator kicks off your access to the Medicare 101 Platform.

Through our **Elite Advisors** program, we recognize our best performers/producers with a reduced marketing platform fee.

*Please note that your platform fee is not included in your marketing costs.

Elite Advisors

Medicare 101 Elite Advisors receive a 50% reduction in their platform fee when they have met all the following criteria:

- The Advisor has all of their Medicare contracts under our agency hierarchy.
- The Advisor has completed six (6) campaigns (either virtually or in-person).
- The Advisor has written 50 Medicare Supplement or Medicare Advantage policies.
- The Advisor has marketed consecutively (without a 60-day gap between campaigns).