

LAHUI

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of Health Underwriters

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of Health Underwriters

5th Annual Medicare Summit

"Become A Medicare ICON"

PROGRAM

August 20-21, 2019

Pickwick Gardens Conference Center





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Korey Platt (805) 402.0522 korey.platt@blueshieldca.com

Kris Corso (949) 742.0302 kris.corso@blueshieldca.com



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*Humana Inc First Quarter 2019 Earnings Release 5/1/2019

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5th Annual Medicare Summit

Schedule of Events

Tuesday - August 20th, 2019

Certifications-Product Rollouts-CE Courses Morning Sessions

8:00 am	Registration	Lobby
8:00 am – 5:00 pm	Exhibitor Set-ups in Exhibitor Hall	Magnolia Terrace
9:00 am – 5:00 pm	Exhibitor Hall Open	Magnolia Terrace
9:00 am – 10:00 am	Blue Shield/Blue Shield Promise	Embassy Suite
10:00 am – 11:00 am	SCAN Connections (DSNP) Certification	Orchid
10:00 am – 11:00 am	Wellcare – 2020 Product Rollout	Rose Garden
11:00 am – 12:00 pm	Humana – 2020 Product Rollout	Embassy Suite
12:00 pm – 1:00 pm	Lunch	

Afternoon Sessions

1:00 pm – 2:00 pm	Changes to Medicare 2020 – 1CE <i>Peter Bauer, Region 9 CMS Rep</i>	Embassy Suite
2:00 pm – 3:00 pm	Anthem – 2020 Product Rollout	Rose Garden
3:00 pm – 4:00 pm	Employer Benefits vs. Medicare Benefits – Stay or Go? – 1CE, <i>David Garcia</i>	Embassy Suite
4:00 pm – 5:00 pm	Becoming a Medicare Expert – 1CE <i>Brad Miles</i>	Rose Garden
5:00 pm – 7:00 pm	Welcome Reception - Outside in the Pavilion and Gardens Please join us for Networking, Food, and Cash Bar!	

Wednesday - August 21st, 2019

Exhibit Hall – Speakers – Breakout Sessions

7:00 am – 10:00 am	Registration	Lobby
7:30 am – 8:30 am	Early Bird – Breakout Session Planning for the Medicare Annual Enrollment Period (1CE) <i>Neil Booth, AMA</i>	Orchid

5th Annual Medicare Summit

Schedule of Events

Wednesday - August 21st, 2019 continued

8:00 am – 9:00 am	Exhibit Hall OPEN & Breakfast	Magnolia Terrace
8:45 am – 9:00 am	Welcome and Opening Ceremony	Royal Ballroom
9:00 am – 9:50 am	Keynote Speaker, <i>Kevin Trokey</i> <i>NAHU, Q4 Intelligence</i>	Royal Ballroom
9:50 am – 10:50 am	Keynote Speaker, <i>Elisabeth Mack, RN</i> <i>Geriatric Cannabis</i>	Royal Ballroom
11:00 am – 12:00 pm	Breakout Sessions 1CE, Beginner – Migrating to Medicare The A, B, C, and D's of Medicare <i>Barry Sikov, Belair Insurance</i>	Rose Garden
	1CE, Advanced – Building a Lasting Provider Relationship to Benefit the Patient, Provider, and Agent" <i>Sandy D'Elia, Blue Shield of CA</i>	Embassy Suite
12:00 pm – 1:30 pm	Exhibitor Hall Open	Magnolia Terrace
12:00 pm – 1:30 pm	Lunch is Served (Exhibitor Hall Open)	Royal Ballroom
Afternoon Sessions 1:30 pm – 3:30 pm	Exhibit Hall Open	Magnolia Terrace
1:30 pm – 2:30 pm	Breakout Sessions 1CE, Beginner – How to Do a Proper Needs Analysis <i>Paul Davis, Paul Davis Insurance Services</i>	Embassy Suite
	1CE, Advanced – Social Media Marketing <i>Colleen Gimbel, Berwick Insurance Group</i>	Rose Garden
2:30 pm – 3:30 pm	Breakout Sessions 1CE, Beginner – The Advantage of Medicare <i>Advantage, Ryan Dorrigan, AGA</i>	Embassy Suite
	1CE, Advanced – Succession Planning <i>Caroline Marinez</i>	Orchid Room
3:45 pm – 4:45 pm	Keynote Speaker – <i>Joe Navarro, Warner Pacific</i> <i>Generational Selling (1CE)</i>	Royal Ballroom
4:45 pm	Closing Ceremony – Closing Remarks – Sponsor Recognition – Exhibitor and Raffle Prizes	Royal Ballroom

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Registration



Tote Bag



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Speaker Bios



NEIL BOOTH

Neil Has been in the Insurance Industry Since he moved here from the UK in 2013, He is the CEO and Partner of the Family Business of over 35 years. AMA has grown it's portfolio to offer Not only Employee Benefits but also His Agency supports Agents to grow their Business with Senior Products as well as supporting a large Association with their Voluntary Benefits. He is a Soaring Eagle Qualifier of LPRT and was awarded the converted NAHU Emerging Leader award in 2017. Prior to Insurance Neil has held many Leadership positions and has always had a Passion for Developing and Supporting others in every walk of life. Neil has been an Active Board member of LAAHU Since 2013 and is currently the President of the Los Angeles Chapter, He Lives in LA County with his Wife and 3 Girls, And is an Avid Sports fan Including Sports from both sides of the Pond.



PAUL DAVIS

Paul was recognized as one of the Valley's "Trusted Advisors" by the San Fernando Valley Business Journal. Paul has been voted "Best Insurance Agent" by readers of the Daily News in Los Angeles for 16 straight years. The focus of his practice is helping people choose the most appropriate Medicare Supplement, Medicare Part D and Medicare Advantage plans. He is an independent agent representing most of the major carriers. Paul has extensive experience in small group health insurance, Disability Insurance, Life Insurance and Long Term Care Insurance. He was the 2017 recipient of Fernando Award - considered the highest award for volunteerism in the San Fernando Valley and the recipient of the 2014 C.K. Tseng Leadership Award –presented by North Valley Regional Chamber of Commerce.



SANDY D'ELIA

Sandy, is responsible for the growth of Blue Shield and Care1st in the Medicare mainstream and Dual space within California through internal and external distribution channels. Sandy has over 25 years of experience in the Healthcare Administration field and Medicare space. As Sales Director for Secure Horizons, she helped grow the Medicare plans of several Pacificare Western markets, managing multiple distribution channels and working with internal departments to fulfill strategic initiatives. As the VP of Sales for UnitedHealthcare, she held responsibility for creating strategies and collaborating with Clinical Management, Marketing, Provider Contracting, and Product to drive profitable growth in all assigned markets.



RYAN DORIGAN

Ryan Dorigan has been a regional sales manager with Applied General Agency for over 15 years. AGA is the largest Medicare focused marketing agency on the west coast. His primary responsibility is to provide service and support to the independent brokers selling Medicare Advantage and Medicare Supplement products all over the country. Ryan is currently serving as the President of the Orange County Association of Health Underwriters and serves as an at large member on the board of the California Association of Health Underwriters. During his time as a member of this organization. Ryan has traveled extensively all over the Country providing education and training support for independent brokers in the Medicare Advantage and Supplement marketplaces. For the last several years he has traveled to Sacramento and Washington D.C. to meet with legislators and try to advance the role of the independent broker. Ryan is a CE certified instructor in the State of California and he has taught several CE courses throughout the state over the last few years. Ryan has been married to his wife Melissa for five years. They are the happy parents of two pugs.

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Speaker Bios



DAVID GARCIA

David Garcia is the Senior Medicare Sales Specialist for Warner Pacific Insurance Services, one of California's top health insurance General Agencies. David is committed to educating agents about the opportunities available in our nation's Baby Boomer market and exposing opportunities available to agents within their community, network and book of business. He has the ability to simplify the Senior Sale by properly identifying the correct Medicare solution for each client and arming agents with the tools they need to remain compliant. David began his career in the insurance industry in 1998 as a member of the Senior Sales Support team at Blue Cross of California (now Anthem), and has held various roles in support of agent sales since then. A certified CrossFit L2 trainer and coach at CrossFit Kerosene, David resides in Newbury Park, California, with his wife and two sons.



COLLEEN GIMBEL

Colleen Gimbel is Vice President of Strategic Alliances for Berwick Insurance Group. Berwick Insurance is a National Marketing Organization specializing in recruiting and training agents to sell Medicare plans. Colleen oversees Berwick's Marketing and Compliance departments, national recruitment and carrier relations. Colleen's experience includes creating advertising for television, radio, newspaper and magazines; writing technical manuals for compliance, operations and accreditation; and she taught college-level marketing for 17 years. She has also written Medicare and Marketing articles for numerous magazines, websites, newspapers and newsletters. With over 30 years of sales and marketing experience, Colleen loves teaching people how to market themselves and grow their business. She is passionate about helping agents feel comfortable working and selling compliantly in the Medicare arena. She says, "so many agents miss out on Medicare opportunities because they worry about 'the rules.' It's not as hard as people think; you just have to know what you can and can't do and that's where we can help!"



ELISABETH MACK

Elisabeth Mack RN, MBA founded Holistic Caring in 2016 as a concierge medical cannabis consultation service with clinical nurses helping educate, guide, and support patients with product choices, dosages, and timing. Holistic Caring bridges the gap between traditional and cannabis medicine. Her background includes a decade in hospitals where she specialized in psychiatry, diabetes, and medical units. Elisabeth spent the 20 years prior to Holistic Caring in operations, service, and sales management of several health insurance carriers and believes cannabinoid medicine offers our best chance at healing, comfort, and wholeness in a more holistic, economical, and empowering way. She earned an MBA in Healthcare Administration, a Bachelor of Science in Nursing, and a Bachelor of Arts in psychology. She is a member of the Society of Cannabis Clinicians, the American Cannabis Nurses Association, and the board of San Diego Women Grow.



CAROLINE MARTINEZ

Director of FMO/Agent Relations, Blue Shield of CA/ Promise Health Plan Caroline transplanted from the East Coast and started with Blue Shield of CA's Promise Health Plan in the middle of AEP last November! As the Director of FMO/Agent Relations, she is responsible for the relationship management of Blue Shield Promise FMO partners, Medical Group partners, and Agents. She also has responsibility for Operations and Production. Prior to her current role, Caroline was Vice President of Sales for a major FMO back East. As a Sales Management Professional with more than 15 years of experience in coaching, and developing sales & customer-contact teams to achieve high levels of success, she found a love for the Medicare business. She enjoys the California weather, and all of the wonderful Brokers and Agencies that she deals with on a day-to-day basis!!

Speaker Bios



BRADLEY MILES

Bradley Miles is the proprietor of a small insurance agency in North Idaho. All 5 independent agents specialize in Medicare Products. Past work with small and medium group and individual health insurance clients has provided plenty of experience for the many interesting and unusual situations which arise in the Medicare Marketplace.

Brad has been teaching classes on Medicare for over 10 years and providing Continuing Education for agents with Medicare as a subject for more 10 years, as well. Brad seeks to assist all insurance agents to be better prepared to help Medicare Beneficiaries. The goal is to continue improvement with perception for clients when working with a professional h Bradley Miles Health insurance agent.



JOE NAVARRO

Warner Pacific Director of Broker Development Joe Navarro is widely known across California and Colorado for his passionate and unyielding pursuit to inspire and positively impact the lives of those around him. Joe is a creative mastermind and the driving force behind the School of Success, Warner's University for Agents. He is a much-sought-after certified Master Trainer, having recently graduated with a Masters in Gerontology (a study on the aging process), to add to his ability to deliver engaging and content rich presentations. Joe has a long-standing history of serving the needs of agents in the health insurance industry. He was President of LAAHU, and later was a recipient of the Paladin Award, LAAHU's most prestigious honor. Joe currently serves on the Board of Directors for the Ventura County Association of Health Underwriters.



BARRY SIKOV

Barry was born in Detroit Michigan. After three years of intense studies in Physical Sciences at Cass Technical High School, he attended Oakland University in Rochester, Michigan. He earned his Bachelor's Degree in Chemistry, Biology, and Social Sciences – he had a triple major! For the next two years, he worked as a Clinical Chemist at Henry Ford Hospital running their Chemistry Lab. With this scientific background, he attended Wayne State University's Medical School. After a life-changing event dealing with a patient in his second year, he decided he would prefer to work as a Clinical Chemist instead of being a Doctor. Realizing he need to continue growing, Barry transitioned in to the sales of High Tech Scientific Laboratory Instruments, selling to various types of businesses from Aerospace to Commercial Laboratories for the next 20 years.



Speaker Bios



KEVIN TROKEY

Kevin is a business consultant and sales coach who specializes in independent agency transformation strategies.

He has been a part of the agency system for many years and knows what works, and what needs to change. Combined with his understanding of business and the changing landscape of HR/benefits, he creates true strategies of agency differentiation that speak directly to today's decision makers.

He is past president of both the St. Louis Association of Health Underwriters and Missouri Association of Health Underwriters. He is a frequent speaker within the industry and also writes regularly on various industry-related topics.



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