

Medicare Dos & Don'ts: A Guide to Hosting a Compliant

Medicare Education Event

Presented by: Danny Bradford

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|-------|---|-------------------------|
| I. | Introduction/ What are the Medicare Marketing Guidelines?
A. Plan sponsor and agent relationship | (10 minutes) |
| II. | Understanding CMC' role in Enforcing Medicare Marketing Guidelines
A. Secret Shopper Results | (5 minutes) |
| III. | State Law
A. Medicare Supplements | (5 minutes) |
| IV. | The difference between Education and Sales Events
A. Filing requirements
B. Do's and Don'ts | (10 minutes) |
| V. | Generic Marketing Pieces
A. Definition
B. Creation
C. Review
D. Submission | (10 minutes) |
| VI. | Carrier policies on Medicare marketing materials
A. Examples of 3-4 carrier policies marketing materials review
B. Carrier enforcement of marketing guidelines
C. Investigations | (10 minutes) |
| VII. | General Medicare marketing do's and don'ts | (10 minutes) |
| VIII. | Questions/Answers | (5 minutes) |
| | | TOTAL 65 minutes |

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to be presented on
August 23, 2017

1. Bibliography

Available upon request.

2. Course Objectives

Understanding Medicare marketing guidelines and what CMS' role and state laws are enforcing in today's Medicare industry. In addition, some carrier policies will be discussed on their marketing guidelines and enforcements.

3. Attendees will learn:

- A. What are Medicare marketing guidelines?
- B. Understanding CMS' and state laws enforcement
- C. Educational vs. Sales Event
- D. Carrier Policies
- E. Generic Marketing Materials

4. Tuition and Refund Policy

This one hour CE class is being offered at no charge to members.