Create your Personalized Business Plan

Establish your Book of Business

- Direct Mail
  - Preferred Vendors
  - Targeted recipients
    - Turning 65
    - Income
    - Conditions
    - Plan Exits
- Letters to existing Book of Business announcing your growing portfolio to include Health products
- Flyers, Brochures, Postcards (compliant, approved)
- Retail Venues (with permission)
  - Walmart (by invitation)
  - Grocery Chains
  - CVS/Walgreens/Pharmacies
- Mass/Niche Marketing (compliant, approved)
  - Radio
  - Local TV
  - Print
- Business Card, Table Top Displays, Posters in Community

Grow your Book of Business

- Future Contact Permission Form
- Offer business cards at Sales Presentations (for referrals)
- Formal/Informal Group Sales Presentations (must be registered with CMS)
- Host monthly turning 65 birthday parties
- Education Programs/Fair (cannot discuss/provide plan specific materials)
- Physician/Provider Offices
- Establish relationships with Community Organizations/Clubs
  - Hobby/Interest
  - Service Organizations
  - Faith-based Organization
- Special Needs Plans
  - Chronic Conditions/Diabetes
    - Professional/Community Organizations
    - Specialists/Providers
  - Income
    - Food Banks
    - Section 8 Housing Developments/Apts
    - Laundry Mat
    - Check Cashing
- Special Election Periods (SEP)
  - Move
  - Losing Coverage
  - 5 Star
  - Low Performing

Retain your Book of Business

- Annual Notice of Change Meetings
- Contact prior to AEP/OEP
- Book of Business Mailing Labels
- 10-30-60-90 day Service Calls
- Thank You/Birthday/Congratulations cards
- Preventative Services Appointments/Visits
- Silver Sneakers
- Care Management Programs
  - Chronic Health Conditions
  - Chronic Disease
  - Complex Medical Cases
- Medication Therapy Management/Pharmacy Management
  - Chronic Heart Failure
  - Hypertension (High Blood Pressure)
  - Dyslipidemia (Abnormal Cholesterol)
  - Osteoporosis
  - Diabetes
- Health and Well-being Assessment
- Member Health Engagement Programs
- Nurse Advice Phone Lines
- Value Added Services
- Humana Points of Care
- Humana Vitality/United
- Monthly member email/letter communications with value
How Can Advocate Health, LLC Help You Succeed?

Advocate Health, LLC is the perfect business partner for any new or established health insurance agent or agency. Our unmatched knowledge and experience gives agents an advantage to help individuals, families, and employers make informed and confident healthcare decisions. We believe in providing agent support through the lifecycle of an agent...before, during, and after the sale.

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<tr>
<th>Before</th>
<th>During</th>
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<td><strong>Strategic Recruiting</strong>: Targeted agent recruiting based on the opportunity and strength of products in the area.</td>
<td><strong>Leads and Marketing</strong>: The ultimate goal is to build your business so that 80% of your sales come from referrals given by your existing clients. We do this in a customized manner based on your personal preferences and ability. We will support you with mailers, compliant marketing materials, and other known best practices to reach your customers now and meet your income goal.</td>
<td><strong>Manage Your Customer Base</strong>: We provide the support you need to care for your book of business with communication pieces including birthday, thank you, and congratulations cards, Annual Notice of Change meetings, and access to a Customer Relationship Management system.</td>
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<td><strong>Agent Contracting</strong>: We help you avoid the setbacks that can delay the completion of the carrier contracting process.</td>
<td><strong>Enrollment &amp; Application Assistance</strong>: We can offer guidance with application completion and submission.</td>
<td><strong>Application Status Checks</strong>: Advocate can assist with confirming an application was properly received. If needed, we can follow-up to ensure the policy is in force and assist with any issues that may arise.</td>
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<td><strong>Training &amp; Certification</strong>: We’ll guide you through the necessary training and certification/recertification required to sell a carrier’s products. Advocate University also offers ongoing training and educational opportunities.</td>
<td><strong>Plan Review</strong>: Master the best ways to learn about all the products available in your area, plans details, how to find an in-network physician, and how to calculate the cost of prescription drugs under each plan.</td>
<td><strong>Commissions</strong>: We’ll provide you with statements and assist you with any commission inquiries. You may also choose to be paid directly by Advocate Health, LLC*. This arrangement allows us to provide additional benefits to our valued agents including co-marketing dollars, advances, and detailed statements. Direct deposit or live checks are available.</td>
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<td><strong>Personalized Business Plan</strong>: We synchronize the needs of the market with your individual financial goals.</td>
<td><strong>Materials and Supplies</strong>: We’ll help make sure you have everything you need to make a compliant sale, and to take care of customers after the enrollment.</td>
<td><strong>Communications</strong>: Stay informed! Advocate Health’s regular email newsletters and website will provide you with timely and useful information, news, tools, resources, and references.</td>
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<td><strong>Plan and Product Information</strong>: Products and plans change annually. Rely on us for the most current and accurate information available.</td>
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*Ask us about details and how receiving your commissions through Advocate Health, LLC can benefit you as an Independent Agent.*