



|| INTEGRITY

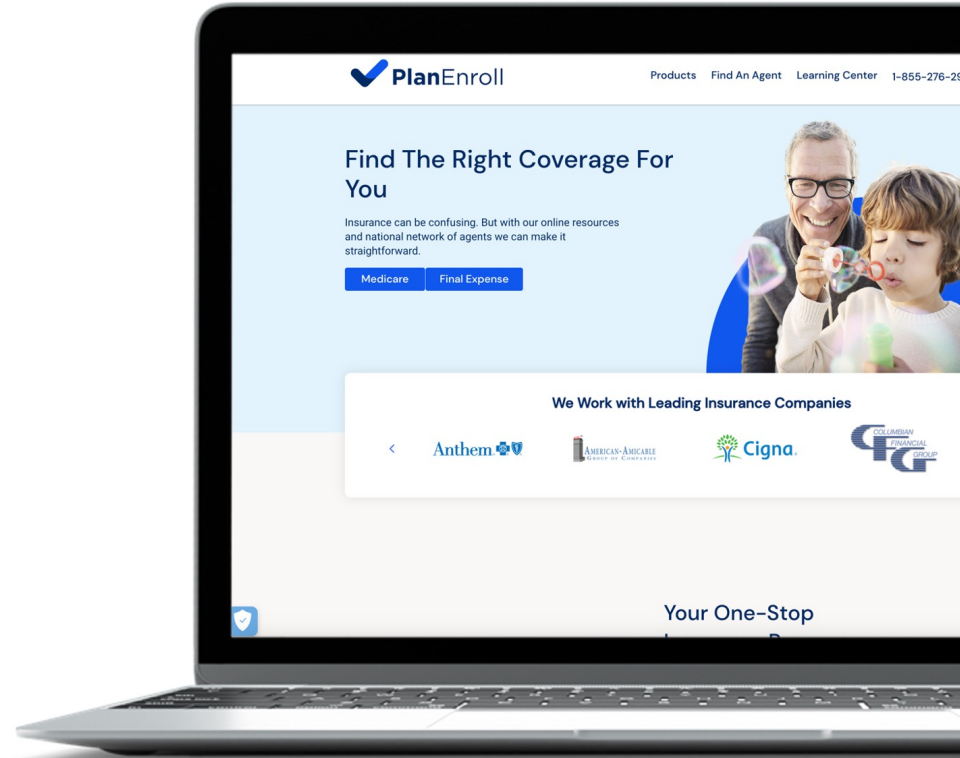
PlanEnroll Age-in Marketing Materials

2024

What is PlanEnroll?

PlanEnroll is a consumer-facing platform that helps consumers feel confident in their Medicare and Life choices, delivering the positive experience they deserve.

Consumers are empowered to learn, explore, compare, and apply for the right policy for them, exactly how they prefer: online, over the phone, or in person with a with a local network agent.



PlanEnroll Network Agents

Where does PlanEnroll fit in making connections from consumers to agents?

When you're a PlanEnroll network agent you get:

- A unified Personal Agent Website
- Prioritization on the Agent Selection Map on PlanEnroll.com
- Access to exclusive leads through PlanEnroll national and local campaigns

Once you're set up, there are several ways PlanEnroll can connect you with consumers who need your help.

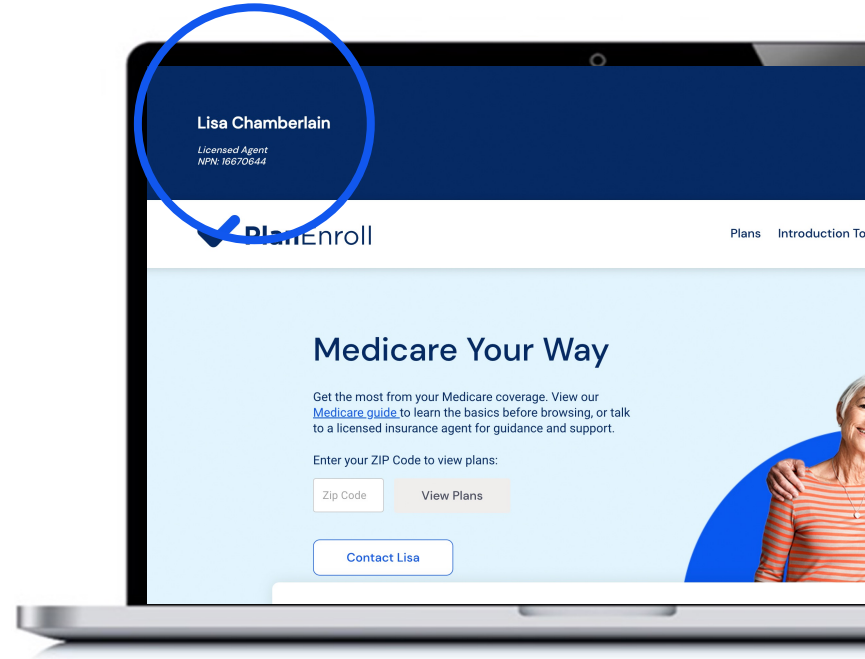


Connecting to Consumers with your Personal Agent Website

Your PlanEnroll Personal Agent Website allows you to share your own PlanEnroll page with consumers, who can then:

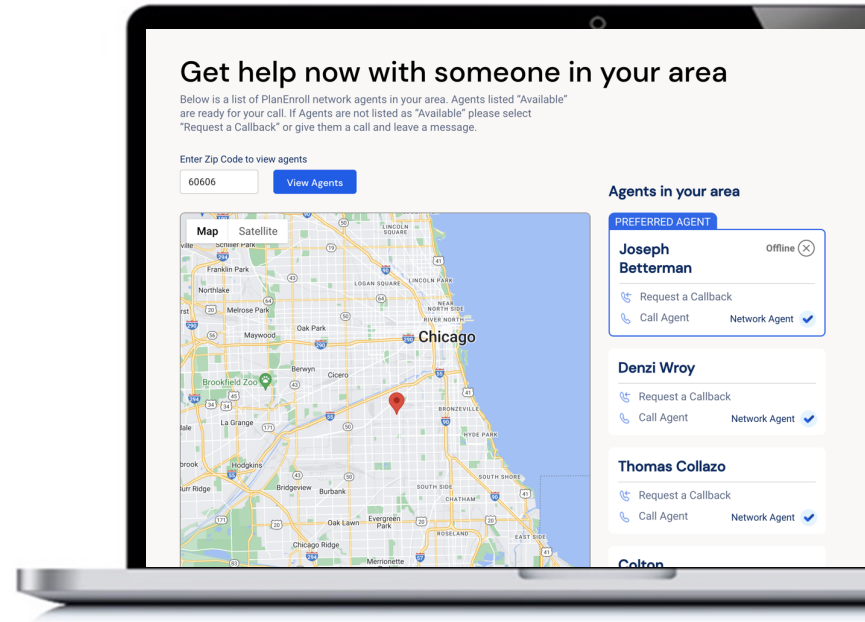
- Create a profile on PlanEnroll
- Access a library of resources
- Receive personalized nurture marketing emails based on on-site actions
- Review quotes
- Complete an application online

And you, their referring agent, get credit for the sale!



Connecting to Consumers with the Agent Selection Map

- On the PlanEnroll website, the Agent Selection Map makes it easy for consumers to find agents in their area who can help them
- Agents who have completed the PlanEnroll Network agent training, and have an active PlanEnroll Lead Campaign, are prioritized in the agent listing



Connecting to Consumers through National Campaigns

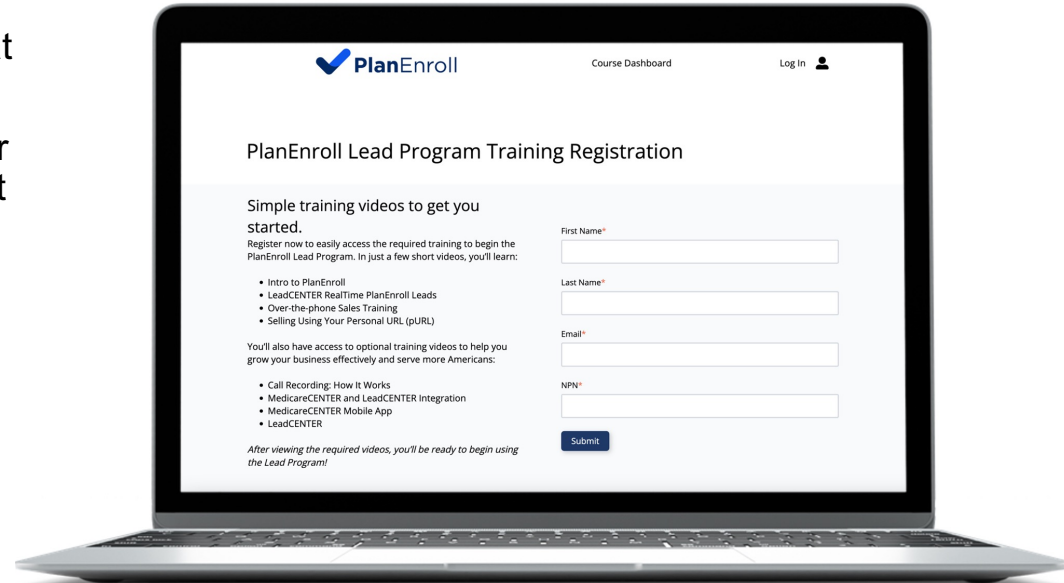
- PlanEnroll runs a combination of local and national advertising, including direct mail, search, social media and other online channels
- Consumers are directed to call the PlanEnroll agent-routing system or go directly to PlanEnroll.com
- When consumers submit their information online with PlanEnroll, they are connected to agents who have created a PlanEnroll Realtime Lead Campaign in LeadCENTER

PlanEnroll leads are all **exclusive** and proprietary generated, with lead costs subsidized to maintain lead quality.



How to Become a PlanEnroll Network Agent and Get the Most from PlanEnroll

1. Complete the simple PlanEnroll training at **Trainings.PlanEnroll.com**
2. Log in to MedicareCENTER and visit your Account page to find your Personal Agent Website link to use in marketing
3. Log in to LeadCENTER and create a PlanEnroll Realtime Lead Campaign
4. Click the “I’m Available” switch in MedicareCENTER to receive realtime calls or data leads



It's that simple.



Age-in Consumer Materials



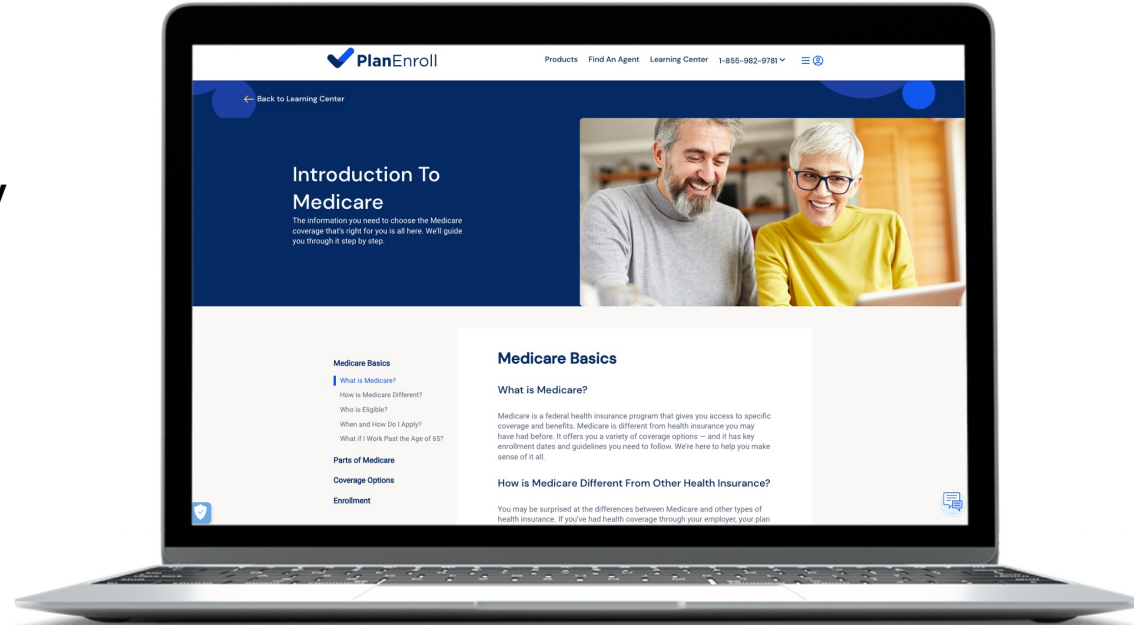
Consumer Materials

We have developed a compliant national consumer marketing campaign targeting soon to be Medicare-eligible consumers turning 65.

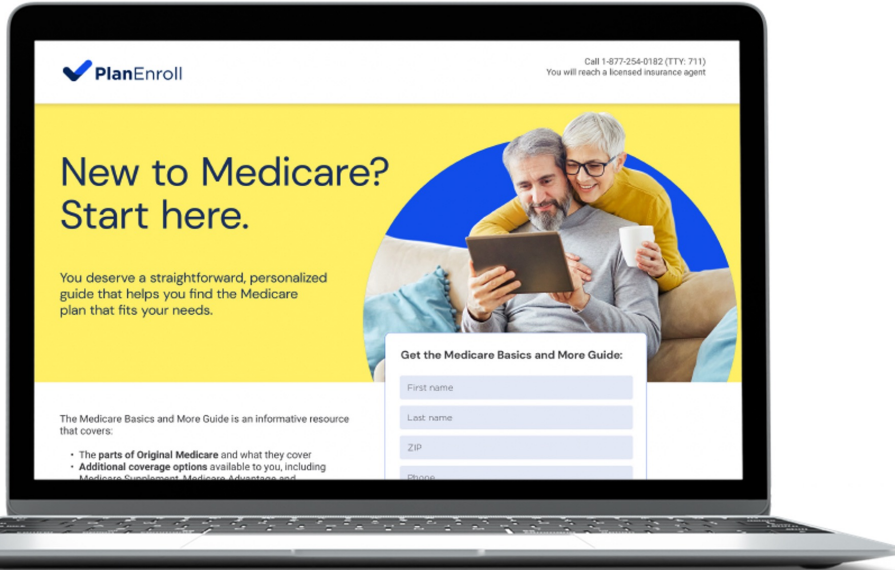
This campaign will generate **high-quality leads** to be shared with PlanEnroll Network Agents.

These materials include:

- Lead Capture landing Page
- Direct Mail
- Digital: Paid Search, Social Media, Display and Native Ads
- Response Emails



PlanEnroll Landing Page



Lead capture form collects consumer information and permission to contact.

Offer includes a free Medicare Basics and More Guide that helps consumers understand their Medicare options.

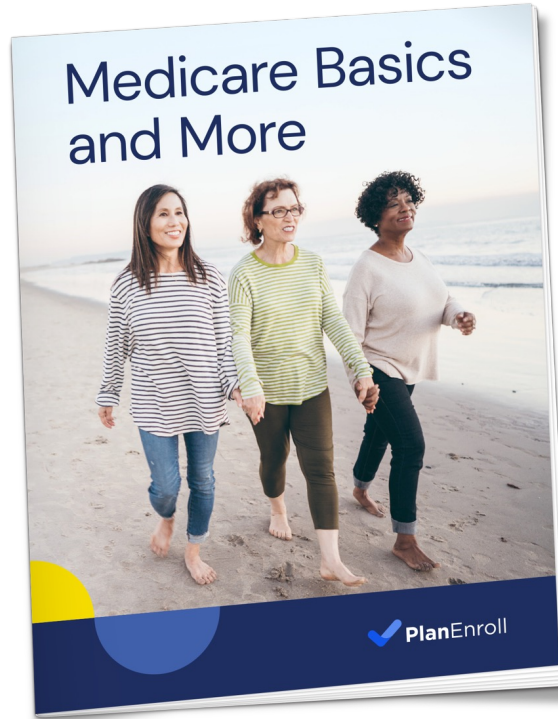
Consumers who provide their information will be routed to pre-selected PlanEnroll Network Agents.

Medicare Basics and More Guide



Guide content includes pages focusing on:

- The four parts of Medicare
- Coverage options, including Original Medicare, Medicare Supplement + Part D and Medicare Advantage
- Eligibility periods
- How PlanEnroll agents can help consumers find the right coverage



The Parts of Medicare

Medicare has four basic parts that cover specific services. Get to know what they are, what they cover and what they cost.

- Medicare Part A**
 - ✓ Hospital insurance
 - ✓ Covers hospital care, skilled nursing facility care, hospice care, and some home health care services
 - ✓ Usually, you don't pay a premium for Medicare Part A. If coverage you've already earned
- Medicare Part B**
 - ✓ Medical insurance
 - ✓ Covers doctor visits, hospital outpatient care, ambulance services, preventive services, durable medical equipment
 - ✓ You pay a monthly premium for Medicare Part B coverage, usually 1 percent out of your Social Security check
- Part A + Part B**
 - Call it Original Medicare and provided by the federal government
- Medicare Part C**
 - aka Medicare Advantage
 - ✓ Combines Part A and Part B and usually includes Part D coverage
 - ✓ Specific includes extra services, out-of-pocket maximums, or benefits not in Original Medicare
 - ✓ Offered by private insurance companies. You can't get a Part C plan unless you're already getting Part A and B coverage. In the private market, you pay an additional premium
- Medicare Part D**
 - ✓ Prescription drug coverage
 - ✓ Only covers prescription drugs
 - ✓ Offered by private insurance companies. You can't get a Part D plan unless you're already getting Part A and B coverage. Private insurers in the market pay an additional premium

Medicare Eligibility and Enrollment

To take full advantage of the benefits you've earned, you need to enroll in Medicare at the right time—and in the right way.

Who's eligible for Medicare?

You can enroll in Medicare if you:

- Are aged 65 and older
- Are under age 65 and have certain disabilities
- Are from Puerto Rico (Special Enrollment Period) – permanent kidney failure requiring dialysis or a transplant

When can I enroll?

If you're 65 and older, you can enroll in Medicare around the time you turn 65. You have a Special Enrollment Period:

- Begins 12 months before your 65th birthday
- Includes the month you turn 65
- Ends 3 months after your 65th birthday

If you aren't eligible for Medicare using the standard, you may have been given a Special Enrollment Period.

When can I change my coverage?

Available in your Initial Enrollment Period, there are other times when you can enroll or change plans.

MEDICARE ADVANTAGE ANNUAL ENROLLMENT PERIOD

• Begins October 15 and ends December 7 each year

• Generally, the time when you can join or switch Medicare Advantage or Part C plans

OPEN ENROLLMENT PERIOD

• Begins January 1 and ends March 31 each year

• If you're in a Medicare Advantage plan, you can switch to Original Medicare or Medicare Advantage plans

• You can go back to Original Medicare and re-enroll just in Part D later

SPECIAL ENROLLMENT PERIODS

- Special enrollment for those with certain events happen in the life
- Each Special Enrollment Period can have different rules
- Based on the Special Enrollment Period you're in
- Changing when you live
- Losing your current coverage
- Your other changing to contract
- Something else in the Medicare plan



Direct Mail Letter



Make your Medicare decision with confidence.

Welcome!
Your Medicare decision matters. That's why it is important to have trustworthy, personalized guidance that helps you feel confident when you find the right plan for you.

To get you started, we created the **Medicare Basics and More Guide** – a straightforward way to learn about your coverage options – **at no cost to you with no obligation to enroll**. This easy-to-read guide is full of useful information that can help you better understand the basics of Medicare and more including:

- The **parts of Original Medicare** and what they cover
- **Additional coverage options** available, including Medicare Supplement, Medicare Advantage and Prescription Drug Plans
- **When you are eligible and how to sign up** for Medicare
- Finding out which Medicare coverage options are **right for you**
- How to **create a PlanEnroll profile** to compare plans in your area
- **Connect with a licensed insurance agent** from our network to answer any questions and help find the right plan for you

Your Medicare coverage choices are important. They can determine what benefits you receive, the cost of your prescription drugs, how much you pay out of pocket for medical expenses and more.

Start with the Medicare Basics and More Guide. Then, we can help you find Medicare plans in your area that best fits your needs. Having guidance can help you feel confident in your decision.

PlanEnroll agents are straightforward and friendly. Just like you deserve.

Download the free Medicare Basics and More Guide now:
basicsguide.planenroll.com/2

Or call to speak with a friendly licensed insurance agent:
1-877-243-6946 (TTY: 711)

MULTIPLAN_PLANENROLL_AIN_DM2_C

Complete and return this card to have a licensed insurance agent contact you.

4 ways to get more information:

Call: 1-877-243-6946 (TTY: 711)
You will reach a licensed insurance agent

Visit: basicsguide.planenroll.com/2

Return card: Mail in postage-paid envelope

Scan:

Name _____
Address _____ City _____
State _____ ZIP _____ Email _____
Phone (____) _____ Best time to call _____

Please send me my free Medicare Basics and More Guide and other information about Medicare. By providing my phone number, I understand a licensed insurance agent may call me to discuss Medicare coverage.

Make your Medicare decision with confidence.

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You will reach a licensed insurance agent

Visit: basicsguide.planenroll.com/3

Return card: Mail in postage-paid envelope

Scan:

Name _____
Address _____ City _____
State _____ ZIP _____ Email _____
Phone (____) _____ Best time to call _____

Please send me my free Medicare Basics and More Guide and other information about Medicare. By providing my phone number, I understand a licensed insurance agent may call me to discuss Medicare coverage.

8.5" x 14" letter in full color and black and white versions.

Detachable business reply card and reply envelope.

Unique phone number, landing page URL and QR code for performance tracking.



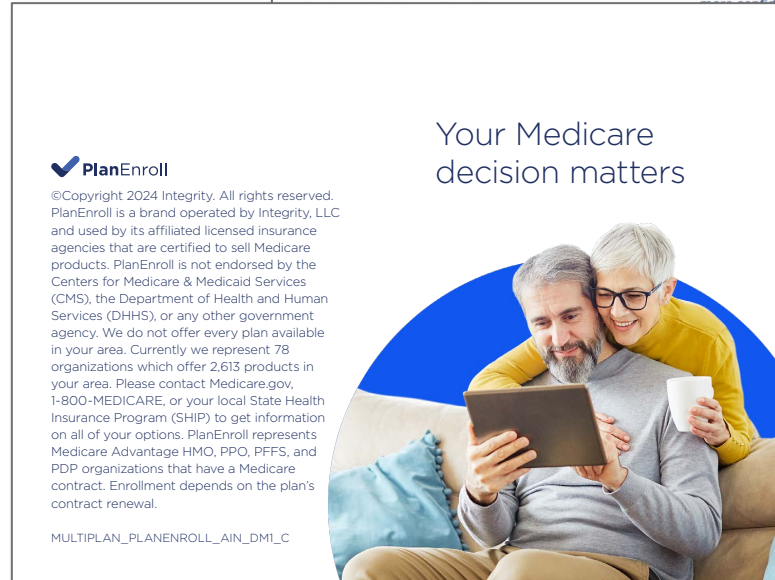
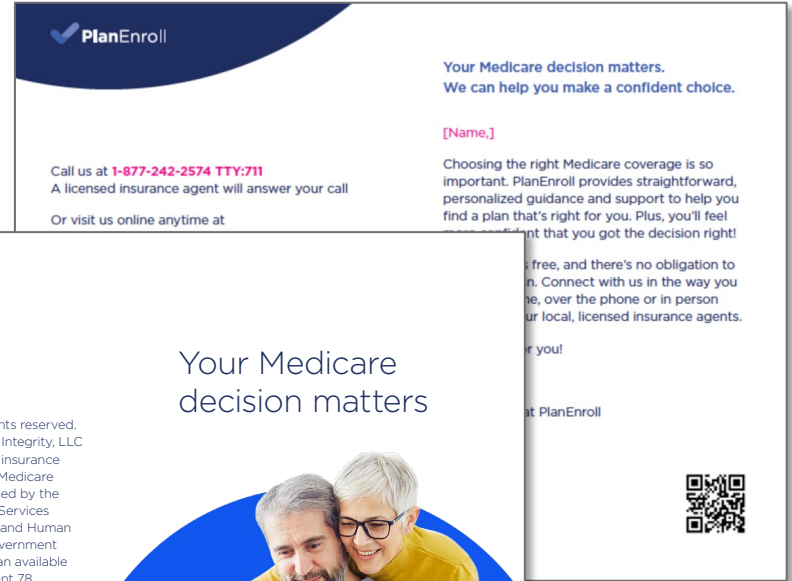
Direct Mail Invitation



10" x 7.5" invitation in full color.

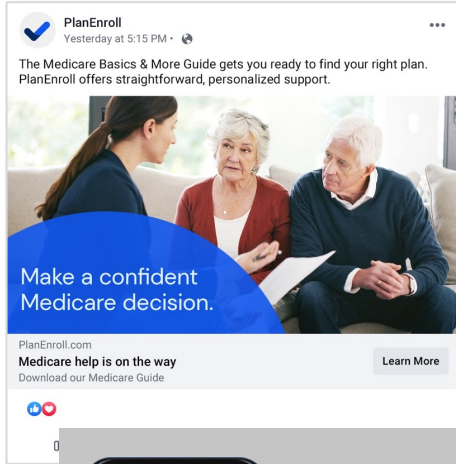
Business reply card included along with unique phone number, landing page URL and QR code for performance tracking.

Direct mail invitation has had strong performance in the past.



Age-in 2024 PlanEnroll Materials

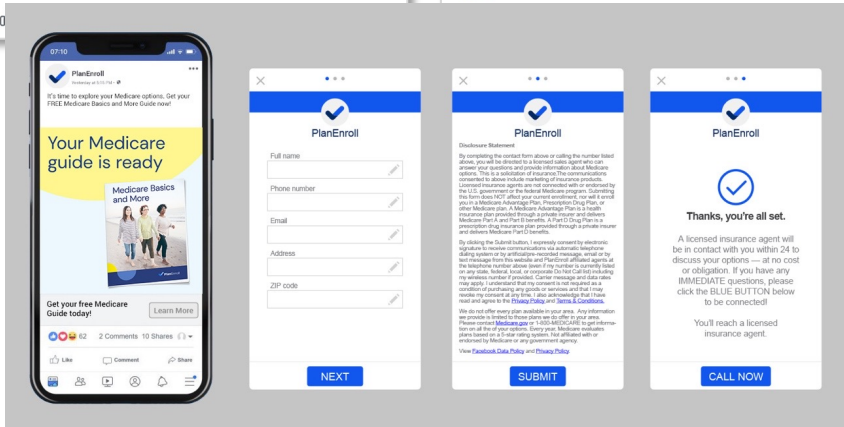
Social



Developed a series of social media ads promoted on Facebook.

Ads direct them to complete the in-platform Facebook lead capture form.

Display banners and various creative sizes.



Digital Display Ads



A series of digital display ads in various creative sizes.

Ads direct consumers to complete the PlanEnroll campaign landing page form to receive their free Medicare Basics and More Guide.

Display ads have proven retargeting effort.



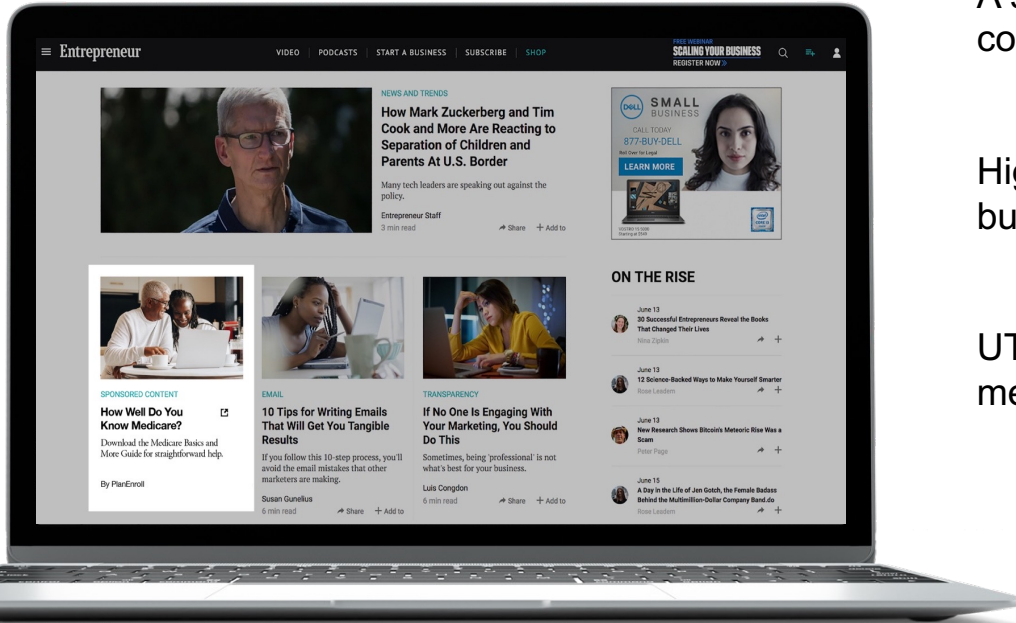
Native Ads



A series of native image and copy combination to drive click-through rates.

High-traffic volume with proven ability to build audience with retargeting efforts.

UTM tracking activated to test messaging and performance.



Response Emails

Once a consumer submits their campaign lead form, they are entered to receive PlanEnroll response and nurturing emails.

Instant delivery of the “Download the Guide” email.



Chaser email quickly follows with reinforcement message.



Preview Text: Open now to download — and find out how to get straightforward, personalized Medicare guidance.

Client Name
To: Robert Zimmerman
Reply To: client@company.com
Subject Line: Here's your Medicare Basics and More Guide!

Today at 10:09 AM



Get started with your **Medicare Basics and More Guide**

[First Name, >]

Welcome to the straightforward way to finding a Medicare plan that's right for you. Your Medicare Basics and More Guide is a great place to start. The guide has helpful info, including:

- The parts of Original Medicare and what they cover
- Additional coverage options available to you, including Medicare Supplement, Medicare Advantage and Prescription Drug Plans
- When you are eligible to enroll
- Steps needed to sign up for Medicare
- Things to consider when reviewing Medicare coverage options that may be right for you
- How to create a PlanEnroll profile to compare plans in your area and find an agent near you

[Download the guide](#)

After you've reviewed your Medicare Basics and More Guide, you might have questions. We make it simple to get personalized help to find the plan in your area that best fits your needs, and make a confident decision.

Ready to take the next step?

Get the help in exactly the way that you want — online, over the phone, or in person through our trusted agent network!



1-877-278-8256 (TTY: 711)

A licensed insurance agent will answer your call.

Preview Text: Thanks for downloading your Medicare Basics and More Guide. We're here to help with straightforward, personalized guidance.

Client Name
To: Robert Zimmerman
Reply To: client@company.com
Subject Line: What's next after downloading your Medicare Basics and More Guide?

Today at 10:09 AM



Your **Medicare** decision matters. We can help.

[First Name, >]

Your Medicare choices matter! Now that you've had time to look over the Medicare Basics and More guide, you might have questions about what's next.

Personalized Medicare help is ready for you! We have agents available to help with straightforward and friendly guidance so you can make a confident decision.



Ready to speak with an agent? We're here for you!

Our licensed insurance agents are here to help you find your right plan. Call us now or visit [PlanEnroll.com](#) to explore your plan options.

1-877-278-8256 (TTY: 711)

A licensed insurance agent will answer your call.

Connect with us on social media and get impactful Medicare tips!



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*Participating sales agencies represent Medicare Advantage (HMO, PPO, PFFS, and POC) organizations that are contracted with Medicare. Enrollment depends on the plan's contract renewal.

We do not offer every plan available in your area. Currently we represent 78 organizations which offer 2,613 products in your area. Please contact Medicare.gov, 1-800-MEDICARE, or your local State Health Insurance Program (SHIP) to get information on all of your options.



Conclusion

PlanEnroll helps consumers have a positive, straightforward experience by connecting them to the help they really want — an expert like you!

It's time to differentiate yourself by becoming a PlanEnroll Network Agent.

