

EDUCATIONAL MEDICARE 101 SEMINARS (In-Person)



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Purpose and Goal:

This seminar approach is designed to serve Turning 65 (T65) individuals with education first –no sales, no checkbook, and no pressure. It’s a safe, informative setting where prospects can learn, ask questions, and begin trusting you as a reliable advisor. These prospects are actively navigating healthcare decisions, but many also need guidance on supplemental insurance, life insurance, and retirement income planning.

Who It’s For:

Prospects age 64, T65, up to 67, targeting 2-4 population-dense zip codes. Prospects are in single-family dwellings. Income brackets can be targeted – preferably between \$30,000-\$100,000. You’re able to search a variety of filters to target your ideal potential clients. This seminar is for people looking for clarity and direction with Medicare and retirement options.

How It Works:

Each month, I utilize a seminar direct mail campaign from a company called **Lead Concepts**. 1,000 postcards are mailed to T65 prospects in selected zip codes. Invitations are to an educational Medicare 101 seminar held in the evening at 6:00–7:00 PM. Currently, I am running one seminar every month, on the 3rd Tuesday (for consistency). To create a welcoming environment, I’m providing guests with pizza and water as light refreshments.

Materials Needed for Seminar Success:

- Compliant Medicare 101 presentation deck from Integrity Marketing Center
- An overhead projector or the option to cast your presentation to a TV screen for viewing
- Business cards (2 per attendee) and branded magnets
- CMS-compliant Consent to Contact forms (no SOAs allowed)
- Printed RSVP guest list attached to a clipboard
- Pens and notepads for attendees to take note

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"Please note that the information provided here serves as general guidelines and should not be considered as fixed timelines for progress. Each individual's journey is unique, and personal circumstances, abilities, and experiences can significantly influence the pace of development. We encourage you to use this as a flexible framework and adapt it to your new agent's specific needs."



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Seminar Introduction Script (Before Presentation):

"Welcome! At Penn Global, an Integrity company, our mission is education-first. We're appointed with many of today's prominent companies, but tonight it is not about products; it's about helping you understand your Medicare options. We also work in life insurance and retirement planning because most clients turning 65 have questions about things like 401(k) rollovers, losing benefits, or planning for Social Security income. We're here to help you get clarity on the big picture: Health, Life, and Retirement. Tonight, we start with Medicare 101. If you have questions during the presentation, just ask!"

Seminar Location:

Corporate office building conference room (50-60 seat max). Other proven venues are libraries and restaurants. Choose locations in high-traffic, well-known areas with handicap accessibility.

RSVP Tracking and CRM:

On the postcard, there are 3 clear ways to register for the event.

1. Call the agent's dedicated phone line (**Integrity phone number for recording**)
2. Call 1-800 RSVP number
3. Scan the QR code on the postcard

An automated reminder call is made the day before the seminar. You are encouraged to call/text each registrant personally with a friendly introduction. This has personally helped me connect with prospects who cannot attend, and you can schedule one-on-one appointments.

Lead Concepts CRM:

Automatically captures RSVP data in real time. You receive an instant email notification when someone registers. The email includes the full name and date of the seminar. All RSVP names, including guests, are stored (whether they attend or not) in the Lead Concepts CRM. The client's name, address, phone, email, etc., are included in the CRM.

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Cost Breakdown:

\$685 for mailing 1,000 postcards

\$240 optional RSVP service

covers up to 40 responses—often used across 2 seminars

First seminar: \$925 (with RSVP service included)

Second seminar: \$700 (due to prorated RSVP usage)

Typical monthly investment: \$700

Seminar Results:

Target RSVP rate: 1-2%

Achieved RSVP rate: 1.2% (I've average 12-13 RSVP to these events)

Highest RSVP to date was 17 and lowest RSVP to date was 6.

Achieved show rate: 1% (On average, 10 people have shown at each seminar)

Each guest is allowed a plus-1. Many spouses, friends, and colleagues have shown.

4-Month Sales Performance:

5 Medicare Advantage Plan (MAPD) enrollments

6 Annuity sales (\$290,000 in premium)

2 Life insurance policies

5 Cross-sell opportunities closed

Plus the future appointments filling out your calendar

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If you have questions during the presentation, just ask!"

Why This Works:

This seminar model positions you as a local educator and trusted guide – a real person they've met. The in-person connection, educational tone, and CRM-based follow-up create warm, qualified leads who already trust your guidance. If you're looking to build a scalable, predictable growth system, this is a proven strategy worth adopting.

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