Marketing Medicare Advantage through Faith Based Organizations
Why the Faith-Based Community

Medicare Advantage Plans and overall Medicare review programs can benefit the congregation, the pastoral leadership, and the agent servicing the faith based organization.

Making this segment of the market even more appealing is the fact that it enables agents to reach prospects in a trusted environment who may be difficult to reach by other methods.
Contact Opportunities

Many faith based organizations have:

- Senior groups
- Caregiver support groups
- Social organizations
- Organized activities
Benefits for the Congregation

An overall Medicare review offers the congregation:

- An explanation of their current coverages, reassuring them of what is available, and granting overall peace of mind
- A no-obligation, trustworthy source of information, enabling a greater understanding of what all options and assistance is available, as potential resources
- A means to affect change, should that be in their best interest
Benefits for the Congregation

Medicare Advantage programs offer the congregation:

- Excellent health benefits programs, freeing means of assistance for others who may be in need without other options of coverage
- Low financial obligations, enabling a larger financial contribution to their theological home
- Better health allowing increased (and extended) participation in church activities, raising feelings of belonging and self-esteem
Benefits for Pastoral Leadership

The Faith Based Organization’s Leadership can benefit from Medicare Advantage Plans by:

- Increased tithe potential
- Increased congregation vitality
- Providing a valuable service to their congregation
- Freeing assistance resources to more of their congregation
Benefits for the Servicing Agent

Agents benefit by having:

- A trusted environment to address prospects who may be otherwise be difficult to reach
- Opportunities to address groups comfortable with a message helpful to those sharing their beliefs
- An established relationship open to referrals to similar organizations
How do I find them?
What do I say?

Hi __________, I hope you can help me.

Who would I speak with someone regarding your church hosting a community meeting to help educate Medicare beneficiaries about the CHANGES in Medicare, and available state and federal ASSISTANCE Programs for their Medicare coverages?

◦ What is the best time to reach them?
◦ What is the best number to reach them at?
◦ Do they work exclusively with or for the Medicare beneficiaries?
◦ Do you have a senior group within your congregation?
What do I say next?

(When you get to the person who can help):

Hi__________, my name is ____________, and I work with Medicare Programs that affect people in your area dependent upon that help. People on Medicare are often confused by their coverages, and I work to help educate the community about their coverages.

I set up Community Events at centers of influence for Medicare beneficiaries in the area. The presentation I use is called “Medicare Made Clear. We also help people be aware of State and Federal assistance programs, using a presentation called “Making the Most of Your Medicare Medical and Rx Benefits”.

We do not conduct any enrollment in any insurance program at this event.
What do I say next?

Would your church be interested in hosting such an event?

Can I get a bit of information from you to help us in our coordination of this program?

Do you have a member that handles most to the insurance needs of the church?

Great, could we get in touch with him/her, can we check with them to see if we can help in any way. What is their name and number?
Tips for Church Contact Follow-Up

(When you get to the person who can help):

Familiarize yourself with all talking points before making your calls.

You are calling as a licensed, certified insurance professional to help inform beneficiaries as to the changes in the Medicare programs, and help their people receive all the available state and federal assistance they may qualify for.
Tips for Church Contact Follow-Up

Look to determine who all would be involved in the process of setting up an informational meeting.

Reference who at the church gave us their name (if not the same person spoken to).

Please know that these people are skeptical and don’t want to send their flock to the fox (salespeople).

But, they do appreciate information given in a non-threatening compliant manner. Remember- “Where your treasure lies, there your heart shall be.”
Tips for Church Contact Follow-Up

Review the script regarding what type of event & why we are looking to schedule one.

Some reasons for the meeting:

◦ Many Medicare beneficiaries are confused by their coverage. They may not have read their ANOC (Annual Notification of Coverage) when notified and now they don’t know what their coverage entails, and whether or not they can change or get more help.

◦ Drug plans can be affected by LIS (Low Income Subsidy), and this can help save them money with the plan they already have.

◦ Health care reform discussions and changes have folks confused and looking for answers.
Tips for Church Contact Follow-Up

You may need to mention that we could work to invite seniors from nearby neighborhoods through an outreach program. They may not be members of their church and this may help the church because we are helping the church reach non members.

This is entirely dependent upon regulations, and the activity undertaken to make this happen; e.g. dialing to drive the neighborhood folks to a Med Supp informational meeting, or distributing flyers in the neighborhood’s centers of influence to help bring folks into the event are compliant activities.
Tips for Church Contact Follow-Up

You should mention that there will be no enrollment at the initial event. (This will eliminate immediate sign ups, but it will help draw bigger crowds and more total events. Ultimately, that equals more business).

Check if you can get the meeting mentioned in the church bulletin and website (multiple times if possible), to help with attendance.
Use Your Arsenal of Topics

Share detailed presentations addressing many topics:

- Medicare 101/Medicare Made Clear
- Medicare Advantage Explained
- Medigap (Medicare Supplement Insurance)
- Medicare Part D
- LIS/MSP (Financial Assistance for Rx & Medicare Costs)
- Final Expense (Legacy Safeguard)
- Life insurance/Charitable Bequests
- Affordable Care Act
What next?

File the event as a “sales event” with CMS, through your contracted carriers.

Study your presentation(s)

Gather needed materials (flyers, handouts, pens, etc.)

Market the event, as you’ve agreed with church leadership

Conduct presentation

Follow-up with attendees, and church leadership
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Thank you!