

JANUARY 2024

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JANUARY



Happy New Year!



HIGHLIGHT OF THE MONTH:

Dual Eligible Special Needs Plans

REMINDERS:

• D-SNPs can be sold year-round	
• Ritter’s Med Supp Quest for Cash begins	
• Update/renew E&O insurance	

IMPORTANT DATES:

• January 1 – MA OEP start	

GOALS:

• Sell at least one D-SNP this month	

 **NOTES:** _____

FEBRUARY 2024

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FEBRUARY

 **American Heart Association Month**

 **HIGHLIGHT OF THE MONTH:**

Heart attack and stroke insurance

 **REMINDERS:**

• Follow up with AEP clients and cross-sell ancillary products

 **IMPORTANT DATES:**

 **GOALS:**

• Contract with a new carrier that offers heart attack and stroke insurance

 **NOTES:**

MARCH 2024

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MARCH

 **HIGHLIGHT OF THE MONTH:**

Final expense insurance

 **REMINDERS:**

<ul style="list-style-type: none"> The average funeral costs between \$7,000 and \$12,000 	

 **IMPORTANT DATES:**

<ul style="list-style-type: none"> March 31 – MA OEP ends 	

 **GOALS:**

<ul style="list-style-type: none"> Strategize final expense sales with your Ritter sales specialist 	

 **NOTES:**

APRIL 2024

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APRIL



National Volunteer Month



HIGHLIGHT OF THE MONTH:

Cross-selling

 **REMINDERS:**

• Community involvement makes an effective marketing strategy

• Attend Ritter's Senior Market Symposium

 **IMPORTANT DATES:**

 **GOALS:**

• Volunteer in your local community for a few hours

• Follow up with five clients and look for coverage gaps

 **NOTES:**

MAY 2024

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MAY

 **HIGHLIGHT OF THE MONTH:**

Dental, vision, and hearing insurance

 **REMINDERS:**

• Look out for new maximum MA & Part D broker commissions

• Start getting ready to take AHIP or NABIP certification training

 **IMPORTANT DATES:**

 **GOALS:**

• Sell at least one dental, vision, and hearing plan this month

 **NOTES:** _____

JUNE 2024

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JUNE



National Annuity Awareness Month



HIGHLIGHT OF THE MONTH:

Fixed annuities



REMINDERS:

• Ritter's Summits registration opens!



IMPORTANT DATES:



GOALS:

• Pass AHIP or NABIP training



NOTES:

JULY 2024

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JULY

 **HIGHLIGHT OF THE MONTH:**

Hospital indemnity insurance

 **REMINDERS:**

<ul style="list-style-type: none"> • Carriers' First Looks & product certifications become available 	

 **IMPORTANT DATES:**

 **GOALS:**

<ul style="list-style-type: none"> • Get a free portfolio review from your Ritter sales specialist 	

 **NOTES:** _____

AUGUST 2024

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AUGUST

 **HIGHLIGHT OF THE MONTH:**

Prescription drug plans

 **REMINDERS:**

- Summits are happening
- Submit new contracting ASAP to avoid the pre-AEP rush

 **IMPORTANT DATES:**

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 **GOALS:**

- Add at least one new MA or Med Supp contract to your portfolio

 **NOTES:** _____

SEPTEMBER 2024

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SEPTEMBER

 **Life Insurance Awareness Month**

 **HIGHLIGHT OF THE MONTH:**

Life insurance

 **REMINDERS:**

• Summits are happening	
• Pre-order Medicare enrollment kits	
• Look out for the latest COLA info	

 **IMPORTANT DATES:**

 **GOALS:**

• Pre-order Medicare enrollment kits	

 **NOTES:** _____

OCTOBER 2024

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OCTOBER



Breast Cancer Awareness Month



National Critical Illness Awareness Month



HIGHLIGHT OF THE MONTH:

Cancer and critical illness insurance

 **REMINDERS:**

<ul style="list-style-type: none"> • Activate all Shop & Enroll direct enroll buttons for AEP 	

 **IMPORTANT DATES:**

<ul style="list-style-type: none"> • October 1 – May begin discussing upcoming plans with clients 	
<ul style="list-style-type: none"> • October 15 – AEP starts 	

 **GOALS:**

<ul style="list-style-type: none"> • Sell at least five Medicare plans within the first two weeks of AEP 	

 **NOTES:** _____

NOVEMBER 2024

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NOVEMBER

 **National Long-Term Care Awareness Month**

 **HIGHLIGHT OF THE MONTH:**

Long- and short-term care insurance

 **REMINDERS:**

• Check for new Medicare Parts A and B costs	• Offer under-65 insurance to help Medicare clients' family members

 **IMPORTANT DATES:**

• November 1 – Under-65 OEP starts	
• November 15 – Halfway through AEP	

 **GOALS:**

• Watch ACA Basics training module in Knight School Path 2	

 **NOTES:**

DECEMBER 2024

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DECEMBER

 **HIGHLIGHT OF THE MONTH:**

Year-end review

 **REMINDERS:**

<ul style="list-style-type: none"> Follow up with your AEP clients a few weeks after AEP ends 	
<ul style="list-style-type: none"> First-eligible MA clients have a trial right 	

 **IMPORTANT DATES:**

<ul style="list-style-type: none"> December 7 – AEP ends 	

 **GOALS:**

<ul style="list-style-type: none"> Develop your follow-up strategy for the new year 	

 **NOTES:** _____
