

# AEP PREP CHECKLIST



Your Step-by-Step Guide to  
Be Ready Before September



**SIMPLIFYING YOUR SALES SUCCESS**

Leverage IAD's 7 Pillars of Success  
to Grow & Scale Your Business

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# STAY ORGANIZED, COMPLIANT, AND CLIENT-READY BEFORE AEP BEGINS

The Annual Enrollment Period [AEP] is your busiest time of year; but the agents who win are the ones who prepare early. Use this checklist to complete the five essential tasks that will set you up for a smooth and profitable season.

## TASK 1: Complete Carrier Certifications

- Verify deadlines for all carriers
- Complete additional modules beyond AHIP
- Track certifications with a simple spreadsheet

## TASK 2: Refresh Your Marketing Materials

- Update business cards, email signatures, and website
- Confirm all brochures, flyers, and ads are CMS-compliant
- Submit carrier approval if materials reference plan benefits

## TASK 3: Organize Your Client Outreach Plan

- Segment existing clients vs. prospects
- Schedule client review appointments now
- Build a communication calendar [calls, emails, mailers]



## TASK 4: Review CMS Compliance Rules

- Download the latest Medicare Marketing Guidelines
- Train team members on updated disclaimers and SOA rules
- Ensure you're set up for call recording/documentation

## TASK 5: Build Your Lead Generation Strategy

- Set up digital ad campaigns
- Schedule community events, webinars, or seminars
- Confirm co-op marketing or FMO support opportunities

## BONUS: Stay Organized

- Use a master calendar to track all deadlines
- Confirm carrier portals and logins are working
- Review client retention strategies before AEP kicks off

## NEED HELP?

IAD offers pre-approved marketing materials, compliance reviews, and lead generation programs to make your AEP a success.

**Contact us today** or call 800-381-0977 to get started.



**SIMPLIFYING YOUR SUCCESS**

Personalized Support • Unmatched Resources





# START YOUR JOURNEY WITH IAD AND UNLOCK YOUR BUSINESS POTENTIAL!

## YOUR SUCCESS IS OUR MISSION...

When you choose Insurance Advisors Direct, you're not just selecting an FMO; you're gaining a dedicated business ally. Our 7 Pillars of Success are designed to help you grow, scale, and thrive.

We're grateful for your interest in partnering with us. Our agents and partners are the heart of our success, and your dedication makes IAD stand out. Thank you for being part of our journey!

## READY TO ELEVATE YOUR BUSINESS?

Join the IAD team and unlock exclusive perks and incentives, including:



**CARRIER INCENTIVES  
AND BONUS PROGRAMS**





**TOP PRODUCER RECOGNITION  
AND REWARD TRIPS**



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