



# Client Marketing

Sample marketing pieces available to customize with  
agent contact info and brand.



# Marketing Assets



## Marketing Pieces

Presentation materials, flyers, brochures, postcards, and more, for print or digital use.



## Business Identity

Brand ready business cards, letterhead, logo options, and more.



## Social Media

General and holiday themed images ready to download and post to social media.





**BOOST  
YOUR  
BRAND**

# Marketing Pieces

Branding your business on print and digital assets for the senior market.



# Medicare Trifolds

■ ■ ■ CORNERSTONE SENIOR MARKETING

INSERT  
LOGO  
AGENT  
AGENCY NAME

“  
*We are  
dedicated to  
educating our  
clients and  
helping them  
make Medicare  
plan decisions  
that are right  
for them.*



## CONTACT US

123 Anywhere St.,  
Any City, State

123-456-7890

[www.reallygreatagent.com](http://www.reallygreatagent.com)

## MEDICARE ADVANTAGE PLANS

Understanding your  
Medicare options

### About Medicare Advantage Plans

Medicare Advantage (MA) insurance is a type of Medicare health plan offered by a private company that contract with Medicare to provide you with all your Part A and Part B benefits.

### Good to know

You remain enrolled in Original Medicare even if you enroll into a Medicare Advantage plan. Some MA plans have a \$0 premium however, regardless of how much you pay for a MA plan, you must continue to pay your Medicare Part B premium.

### A Medicare Advantage Plan may be the right fit for you if...

- You want to take advantage of low to no premiums and flat dollar copays
- You are accustomed to utilizing provider networks

### Extra Benefits

- Dental and vision
- Hearing aids
- Gym membership
- Transportation to health-related services
- Prescription coverage included in most plans



### You may ask...

#### AM I ELIGIBLE\*?

To be eligible for a Medicare Advantage plan you need to be entitled to Medicare Part A. You also need to be enrolled in Medicare Part B, and live in the plan's service area.

#### WHEN CAN I ENROLL?

You can enroll any time you have a valid election period. All Medicare beneficiaries can change their plan during the Annual and Open Enrollment Periods or if you qualify for a Special Election Period.

#### WILL MY PLAN CHANGE?

While carriers cannot change their benefits during the year, they may adjust plan benefits for January 1st. You will be notified of any changes through their Annual Notice of Change packet.

\*People with End Stage Renal Disease (ESRD) are not usually eligible for Medicare Advantage plans.



# Medicare Trifolds

INSERT  
LOGO  
AGENT  
AGENCY NAME

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## MEDICARE SUPPLEMENT PLANS

Understanding your  
Medicare options

### About Medicare Supplement Plans

Medicare Supplement plans, also known as Medigap, are designed to fill the gap in your medical coverage left by Medicare. A Medigap plan provides financial peace of mind if the unexpected happens.

### Good to know

Most Medigap plans are guaranteed renewable for life, meaning if you pay your premium, you are covered and coverage cannot be cancelled because of any health issues or because of your age.

### A Medicare Supplement plan may be the right fit for you if...

- You are willing to pay a monthly premium and have low to no out-of-pocket costs
- Access to a national provider network is important

### A Medigap plan can help pay for:

- Medicare Part A and Part B deductibles
- Medicare Part B copayment
- Skilled Nursing Facility (first 100 days)



## You may ask...

### AM I ELIGIBLE?

As soon as you reach 65 and are eligible to apply for Medicare, you are also eligible to purchase a Medicare Supplement policy.

### WHEN CAN I ENROLL?

You have a one-time, six month Open Enrollment Period (OEP), from the first day you signed up for Medicare Part B, to enroll in any Medigap plan with no health questionnaire. After the Medigap OEP issue is not guaranteed.

### IS PART D INCLUDED?

Medicare Supplement plans do not include Part D (prescription drug coverage) however, you can add a separate, stand-alone Part D drug plan to your coverage portfolio.



# MedicareTrifolds

Choosing how you receive your Medicare coverage can be challenging.

It's so important to compare the costs and the benefits of each plan type and how they relate to your own personal healthcare needs and financial situation.

**We can help.** The licensed agents at [Your Agency name] can search the Medicare Advantage and Medicare Supplement plans in your area and present options tailored to your needs.

**Licensed, trained, and certified.** Rely on our extensive Medicare training to save you time, offer greater options and provide year-round service.

## CONTACT US

Address  
City, State, Zip

Phone: 555-555-5555  
Email: agent@agency.com

www.agencywebsite.com

YOUR  
LOGO  
HERE

An informative guide to

## UNDERSTANDING YOUR MEDICARE OPTIONS

### MEDICARE SUPPLEMENT AND MEDICARE ADVANTAGE PLANS

YOUR  
LOGO  
HERE

MEDICARE SUPPLEMENT COVERAGE FOR CERTAIN COSTS		MEDICARE ADVANTAGE COVERAGE FOR SERVICES
Comparison	Medicare Supplement	Medicare Advantage
Requires enrollment in Medicare A and B	Yes	Yes
Written health screen required	Yes, except certain times	No
Available to Medicare eligible persons over and under age 65	Yes. Options are limited for those under age 65	Yes. Except those with End Stage Renal Disease. Must live in plans service area
Out of country emergency medical coverage	Yes, with some plans	No, with exceptions
Out-of-pocket maximum	Yes, with certain plans	Yes, with all plans
Includes prescription drug coverage	No	Yes, with most plans
Coverage for out-of-pocket costs	Yes. Coverage can vary	No
Provider choice	Yes	No. Provider networks
Billing	Provider bills Medicare	Provider bills insurer
Specialty care referral	Not required	May be required
Additional coverage (dental, vision, other)	No, with most plans	Yes, with some plans
Plans with same name have same benefits	Yes	No
Switching Plans	Yes. Anytime. Contact plan to enroll	Yes, during an enrollment period



An informative guide to  
**UNDERSTANDING YOUR  
MEDICARE OPTIONS**

Medicare Supplement and  
Medicare Advantage Plans

## IMPORTANT CONSIDERATIONS MEDICARE OPTIONS

**Choosing how you receive your Medicare coverage can be challenging.** It's so important to compare the costs and the benefits of each plan type and how they relate to your own personal healthcare needs and financial situation. Equally important, and also time-consuming, is checking the provider networks and drug formularies for each plan, making sure you have access to the care and coverage you want.

To better understand your situation, consider researching plans by looking at additional key factors that can affect your decision, such as:

- Monthly premium costs
- Expected costs of services on each plan
- How often will you use healthcare services
- Deductible amounts, if any
- Potential out-of-pocket costs per plan type
- Anticipated copays for medications



## TAKING A CLOSER LOOK MEDICARE ADVANTAGE

COVERAGE FOR SERVICES

**Medicare Advantage** plans, also known as MA's, and Part C, are sold by private insurance companies. They are an alternative to Original Medicare and must cover at least the same benefits of Original Medicare. Also, many plans may offer coverage for routine dental, vision and hearing care along with prescription drug coverage, all of which are not covered by Original Medicare. The level of coverage may vary by plan and some plans may cover services like healthy home meal deliveries, transportation to physician appointments, and more.

## TAKING A CLOSER LOOK MEDICARE SUPPLEMENT

COVERAGE FOR CERTAIN COSTS

**Medicare Supplement** plans, also called Medigap, are available from private insurance companies. These plans provide coverage that fills in the gaps for out-of-pocket costs that Original Medicare Parts A and B don't cover. There are a variety of plan types to choose from and coverage depends on the type of plan selected. Plans can include coverage of Medicare deductibles, copayments and coinsurance, plus foreign travel emergency care, Medicare Part B excess charges, and more.



## ALTERNATIVES AND ADDITIONS TO ORIGINAL MEDICARE

Administered by the federal government, Medicare provides health insurance benefits for individuals 65 and older, or under age 65 for people who qualify due to disability. Original Medicare has two primary components; Part A, which covers hospital services and Part B, which covers medical services, including doctor visits, outpatient care, and more.

Original Medicare does not cover everything however, it is not the only coverage option. Medicare Supplement plans can fill in coverage gaps to help with certain out-of-pocket Medicare costs while a Medicare Advantage plan is a replacement of Original Medicare Part A and Part B, providing at least the same level of benefits but with the option to get additional benefits.



## WHICH PLAN IS RIGHT FOR ME? COVERAGE CHOICES

SUMMARY OF OPTIONS

**Medicare Advantage** is designed for people that value low monthly premiums offered in a plan that combines health and drug coverage together in a single policy, and use in-network doctors and hospitals.

**Medicare Supplement** may be the best choice if you value a predictable keep original Medicare in the coverage and use out-of-network care providers.

## SUMMARY OF MEDICARE COVERAGE CHOICES

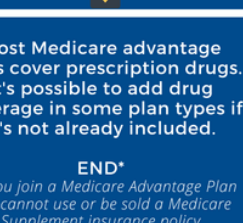
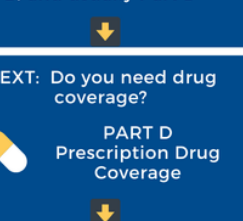
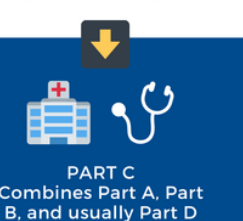
### PATH A

ORIGINAL MEDICARE



### PATH B

MEDICARE ADVANTAGE PLAN





Flyers

FREE EDUCATIONAL SEMINAR

# Medicare Basics

Learn the A's, B's, C's, & D's of Medicare and differences between Medicare Supplement and Medicare Advantage Plans

[insert event date]  
[insert event time]  
[insert event location]  
[insert event location]

**Call 555.555.5555 to register**

For accommodations of persons with special needs at meetings call <insert phone and TTY number>



insert logo here

AGENT | AGENCY NAME



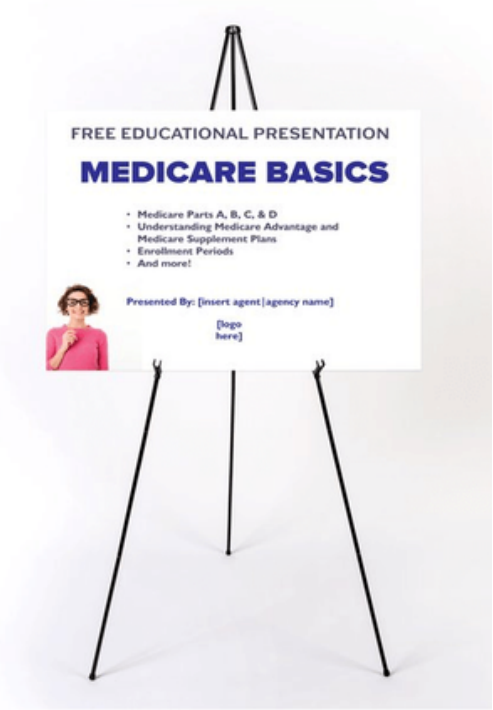
FREE EDUCATIONAL VIRTUAL EVENT

## Understanding Medicare

EDUCATIONAL & INFORMATIONAL	VIRTUAL EVENT INFORMATION
<ul style="list-style-type: none"><li>• Medicare Basics</li><li>• Explanation of each Part (A, B, C &amp; D)</li><li>• Differences between Medicare Supplement vs. Medicare Advantage</li><li>• Enrollment Periods</li></ul>	<p>Learn about Medicare at our free webinar event.</p> <p>Date:</p> <p>Time:</p> <p>Call 888.888.8888 to register [Click here to register]</p>

**Presented by**  
[insert agent | agency name]

Display



Presentation

# Understanding Your Choices

## A's, B's, C's, and D's of Medicare

FREE EDUCATIONAL EVENT

# MEDICARE & YOU

MONTH DAY TIME

VIRTUAL WEBINAR

Presented by: Agent/Agency  
Call 555-555-5555 to register

INSERT COMPANY LOGO HERE>

FREE VIRTUAL EDUCATIONAL EVENT

# MEDICARE BASICS

Date | Time  
Register [phone or link]  
A comprehensive overview of Original Medicare, Parts A and B, Medicare Advantage, Medicare Supplement and Part D (Prescription Drug).

Social Media Posts



ARE YOU OR SOMEONE YOU  
KNOW TURNING 65?

I can help you find the Medicare Plan that's right for you!

New to Medicare?  
Confused about your  
options?

Let me help you choose the  
right plan for your life and  
your budget!

Call for an appointment to  
review your current plan.

*Virtual or phone appointments available.*



Agent Name  
Independent Insurance Agent

xxx.xxx.xxxx  
email@email.com  
Address  
City, State, ZIP

ARE YOU OR SOMEONE YOU  
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I can help you find the Medicare Plan that's right for you!

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Confused about  
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Let me help you choose the  
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Call for an appointment to  
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*Virtual or phone appointments available.*



Agent Name  
Independent Insurance Agent

xxx.xxx.xxxx  
email@email.com  
Address  
City, State, ZIP



MEDICARE RECIPIENTS

ARE YOU OR SOMEONE YOU KNOW ELIGIBLE FOR MEDICARE?

Call Today for a Consultation

I can help you examine your options with the  
Medicare program, as well as help you find  
the plan right for you.

Call me to set an appointment - virtual or  
phone appointments are available - where we  
can discuss:

Medicare Supplement | Medicare Advantage  
Part D Prescription Drug  
Cancer Protection | Dental/Vision/Hearing  
Hospital Indemnity | Final Expense

I am an independent agent dedicated to  
educating my clients and helping them make  
the plan decisions right for them.

Agent Name  
Insurance Broker

Address line 1  
Address line 2  
email@email.com  
555-555-5555



# AEP Flyers



**MEDICARE ANNUAL ENROLLMENT PERIOD**  
Begins October 15th



This is your time to make changes.  
Will your PCP or Specialist remain in network?  
Are your PCP and other co-pays increasing?

**Call for an appointment to review your current plan!**  
Virtual or phone appointments available

image  
or  
logo  
here

**Agent Name**  
Independent Insurance Agent  
  
xxx.xxx.xxxx  
email@email.com  
Address  
City, State, ZIP

**MEDICARE ANNUAL ENROLLMENT PERIOD**  
Begins October 15th



This is your time to make changes.  
Will your PCP or Specialist remain in network?  
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Virtual or phone appointments available

image  
or  
logo  
here

**Agent Name**  
Independent Insurance Agent  
  
xxx.xxx.xxxx  
email@email.com  
Address  
City, State, ZIP





QUESTIONS ABOUT MEDICARE?

CALL [AGENT NAME]

Let me help you find the plan that fits your life and works with your budget.

Pay for your no cost, no obligation consultation. 1-8955

CALL TODAY!

Understanding your Medicare options can be complicated. I can help with:

- Medicare
- Medicare Advantage
- Medicare Supplement
- Prescription Drug
- And more!

Agent Name  
Licensed Insurance Agent

123-456-7890  
email.greatagent.com



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JOIN US

Please join us for an upcoming free educational meeting discussing Medicare basics and navigating the options available to you. The meetings will be informative and beneficial. You are under no obligation to attend.

Agent Name  
Licensed Insurance Agent  
xxx.xxx.xxxx  
email@email.com  
Address1  
Address2

LOCATION - ADDRESS

Time.....Location

Time.....Location

LOCATION - ADDRESS

Time.....Location

Time.....Location

RSVP: Call today to reserve your place: xxx.xxx.xxxx (TTY/TDD xxx)

For accomodation of persons with special needs educational events call: xxx.xxx.xxxx (TTY/TDD xxx)

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## Time to review your Medicare Coverage

ANNUAL ENROLLMENT IS  
OCTOBER 15 - DECEMBER 7

CALL TODAY TO SCHEDULE  
YOUR APPOINTMENT

AGENT OR AGENCY NAME  
LICENSED AGENT

626-504-4938  
4898 WOODSTOCK DRIVE  
CITY, STATE, ZIP  
EMAIL@REALLYGREATAGENT.COM  
WEBSITE@REALLYGREATSITE.COM



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[insert  
agent  
photo]

**QUESTIONS  
ABOUT  
MEDICARE?**

CALL [AGENT NAME]

Let me help you find the  
plan that fits your life and  
works with your budget.

Call today for your no cost, no  
obligation consultation.

**123-456-8955**

Licensed Agent

This is an advertisement

**CALL TODAY!**

Understanding your  
Medicare options can be  
complicated. I can help  
with:

- Medicare
- Medicare Advantage
- Medicare Supplement
- Prescription Drug
- And more!

**Agent Name**  
Licensed Insurance Agent

123-456-7890  
email.greatagent.com



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# Postcards/Mailers



Better understand your options at our informative event!

MONTH  
DAY  
YEAR | **Free Event**

**VENUE**  
Address

AGI  
AGE

**Agent  
Image**

Agent Name

**DATE:**  
**TIME:**

Call today to reserve your place.  
555.555.5555 (TTY/TDD xxx)

For accomodation of persons with special  
needs educational events call: xxx.xxx.xxxx  
(TTY/TDD xxx)

**PORTER INSURANCE**  
Serving Northwest Ohio since 1995

**Life happens!**

*Let us help find the best  
plan to fit your life today.*

- **Medicare**
- **Medicare Advantage**
- **Medicare Supplement**
- **Prescription Drug**
- **And more!**

**Agent Name**

Licensed Insurance Agent

123-456-7890

email@bestagent.com

Medicare plans can  
change every year.

**FREE PLAN  
REVIEW**

Have your needs changed?

**2021 Annual Enrollment Period**

*October 15 - December 7*

Call today to schedule a no cost, no obligation appointment  
Speak with a licensed insurance agent

This is an advertisement



# Postcards/Mailers



**company logo**

We **LOVE** our clients! If you have been happy with our services then the highest compliment you can give us is the referral of a new client.

It is a pleasure to work with you and we will sincerely appreciate each and every referral you send.

Kindest regards,

Agent/Agency Name  
xxx.xxx.xxxx  
agent@agency.com



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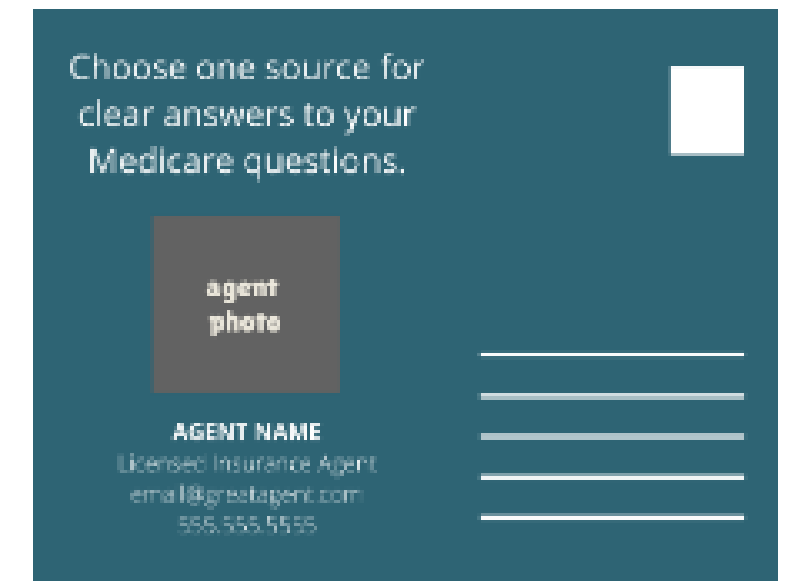
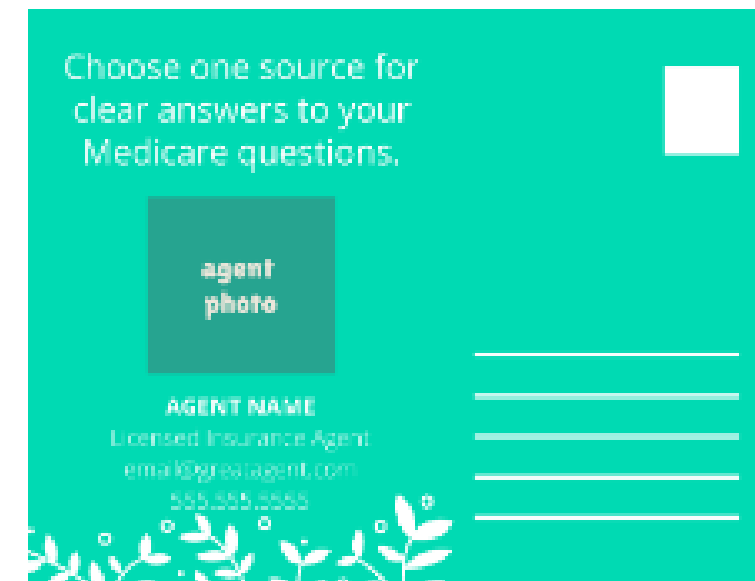
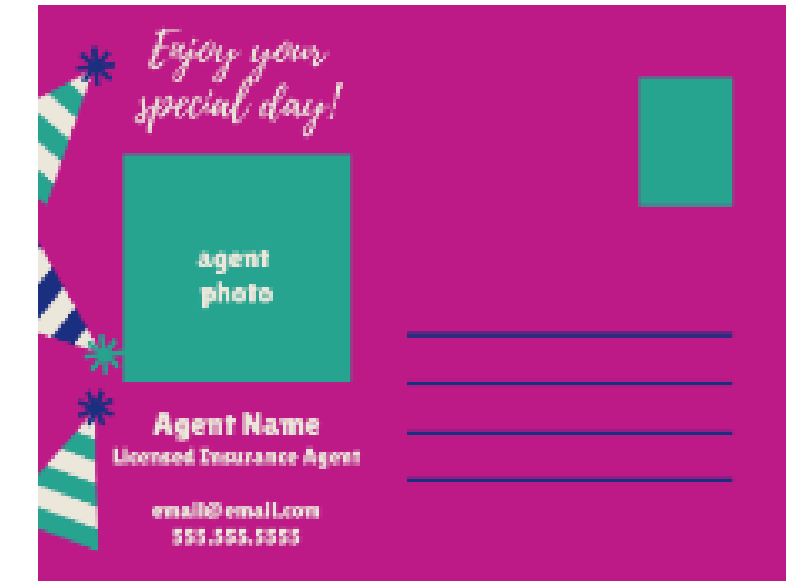
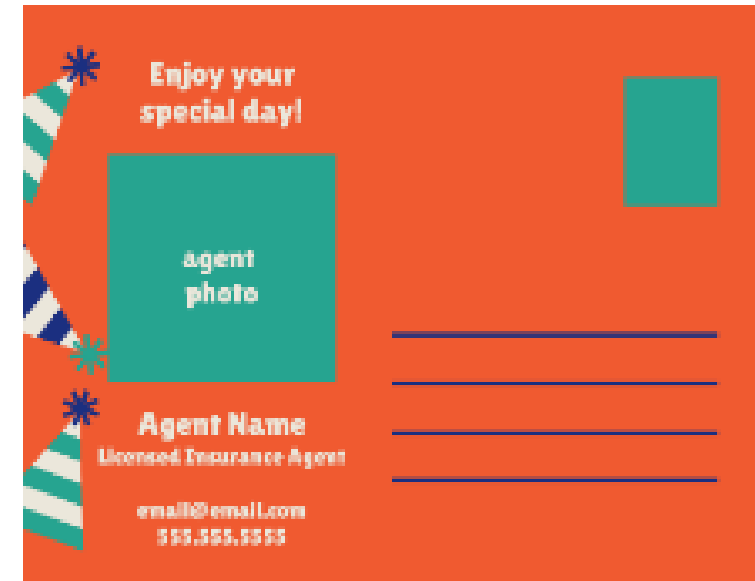
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# Postcards/Mailers





**Thank you** for your **Referral**  
It was such a pleasure to  
serve **you**, and I appreciate  
your recent **referrals**.

**Thank you** so much for your  
trust and confidence. Great  
clients like **you** are the reason  
my business is thriving.

**Sincerely,**

**Agent Name**

Licensed Insurance Agent

XXX.XXX.XXXX

email@greatagent.com

*Thank  
you!*

**THANK YOU**

**THANK YOU**

We appreciate your trust and  
confidence in our business.  
Thank you so much for your  
recent referrals.

We look forward to helping  
these new clients understand  
their Medicare options.

**Sincerely,**

**Agent Name**

Licensed Insurance Agent

XXX.XXX.XXXX

email@greatagent.com





# Business Identity

Pre-designed assets ready to customize with your brand, colors, and contact information.

# Business Cards





# Business Cards

**PORTER  
INSURANCE**

*Serving Northwest Ohio since 1995*

**JOHN PORTER**  
*Licensed Insurance Agent*

555-456-7890  
123 Timber Rd., Toledo, OH 12345  
john@porterins.com  
www.porterins.com

**RIGHT FIT**  
INSURANCE AGENCY

**ADELINE PALMERSTON**  
Licensed Insurance Agent

123 Anywhere St., Any City, ST 12345  
555-555-5555 | apalmerston@email.com  
www.palmerston.com

PORTER INSURANCE

Dear Ms. Augustin,

A letterhead refers to the heading at the top of a sheet of letter paper. It usually consists of a name and an address, or a logo. This often appears in letters created by companies and individuals for communicating messages, whether it's within the team, business partners, or with clients.

Letterheads are important branding tools as well, as they are sent out to a wide audience. They can set the tone for messages while showcasing your company's expertise and professionalism. This makes it important for you to create a letterhead that captures your brand's identity while presenting important details. It helps to create a template that you can use for different occasions, from inter-office memos to customer correspondences.

Kind regards,

JOHN PORTER  
LIICENSED INSURANCE AGENT

125 Anywhere St., Any City ST 12345  
123-456-7890  
Website: www.reallygreatsite.com  
Email: hello@reallygreatsite.com

RIGHT FIT  
INSURANCE AGENCY

DEAR MR. VERA,

A letterhead is the heading at the top of a sheet of letter paper (stationery). That heading usually consists of a name and an address, and a logo or corporate design, and sometimes a background pattern.

The term "letterhead" is often used to refer to the whole sheet imprinted with such a heading. Many companies and individuals prefer to create a letterhead template in a word processor or other software application. This generally includes the same information as pre-printed stationery but without the additional costs involved.

Letterhead can then be printed on stationery (or plain paper) as needed on a local output device \or sent electronically. That heading usually consists of a name and an address, and a logo or corporate design, and sometimes a background pattern. The term "letterhead" is often used to refer to the whole sheet imprinted with such a heading.

Sincerely,

Adeline Palmerston  
Licensed Insurnce Agent

PALMERSTON.COM / CINCINNATI, OH

HANNAH MORALES

INDEPENDENT INSURANCE AGENT

Dear Mr. Henderson,

A letterhead is the heading at the top of a sheet of letter paper (stationery). That heading usually consists of a name and an address, and a logo or corporate design, and sometimes a background pattern. The term "letterhead" is often used to refer to the whole sheet imprinted with such a heading.

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Sincerely,

Hannah Morales  
Independent Insurance Agent

BOOKER ST., MONDAY CITY, USA

EMAIL HANNAHHELPS@DOMAIN.COM OR CALL AT 123-456-7890

MARCEL ANDERSON

LICENSED INSURANCE AGENT

Dear Mr. Bell,

A letterhead is the heading at the top of a sheet of letter paper (stationery). That heading usually consists of a name and an address, and a logo or corporate design, and sometimes a background pattern.

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Sincerely,

Marcel Anderson  
Licensed Insurance Agent

Office: 555.555.5555  
Cell: 555.555.5555

123 Southville Cor. West Ave.  
Cleveland, OH, 44444

hello@youragent.com  
www.manderson.com

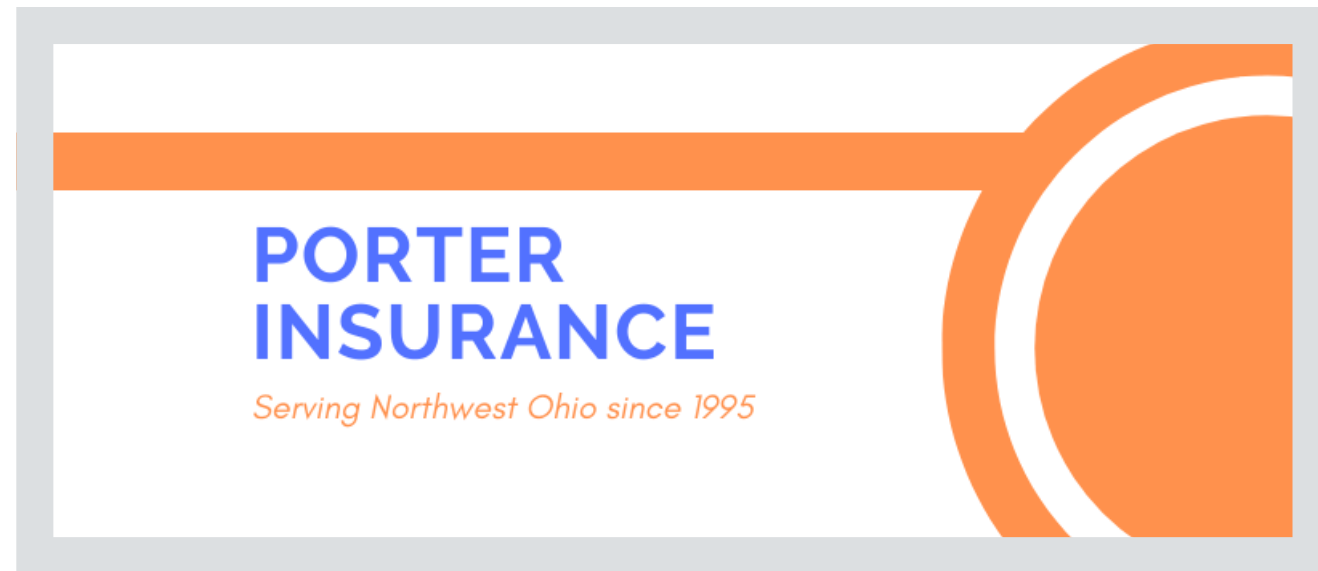


# Business Logo





# Business Facebook Cover





# Social Media

Enhance your own messages and maintain consistent posting on your social media site(s) with ready-made images.



# Social Media Samples



## Good to know!

Common words, terms and acronyms used in the Medicare Program.

### Referral

A written order from your primary care doctor for you to see a specialist or get certain medical services. In many Health Maintenance Organizations (HMOs), you need to get a referral before you can get medical care from anyone except your primary care doctor. If you don't get a referral first, the plan may not pay for the services.

*Explanation of terms in the Medicare program - not a legal document. Source: <https://www.medicare.gov/glossary>*

## Good to know!

Common words, terms and acronyms used in the Medicare Program.

### Medicare plan

Any way other than Original Medicare that you can get your Medicare health or prescription drug coverage. This term includes all Medicare health plans and Medicare Prescription Drug Plans.

*Explanation of terms in the Medicare program - not a legal document. Source: <https://www.medicare.gov/glossary>*

## Good to know!

Common words, terms and acronyms used in the Medicare Program.

### Premium

The periodic payment to Medicare, an insurance company, or a health care plan for health or prescription drug coverage.

*Explanation of terms in the Medicare program - not a legal document. Source: <https://www.medicare.gov/glossary>*

# Client-Facing and Business Marketing Assets

[www.cornerstoneseniormarketing.com](http://www.cornerstoneseniormarketing.com)



## Send us an email

Reach out to your CSM Rep for more info  
or send an email directly to:  
[info@cornerstoneseniormarketing.com](mailto:info@cornerstoneseniormarketing.com)



## Give us a call

Connect with your CSM Rep or call  
the office and connect with the  
Marketing Team: 614-763-2255

