HOSTING CONSUMER EVENTS:
Compliance Guidelines for Success

As you prepare to host an educational (informational) consumer event, it's important to balance between helping your audience and staying compliant.

Consumer events are subject to following guidelines, please refer to them here:
https://www.cms.gov/medicare/health-drug-plans/managed-care-marketing

Before you host an event, it's crucial to understand and follow the guidelines. Failure to comply puts you at risk for penalties, including the risk of losing your license. Contact your upline Compliance Officer and have your event's content approved before moving forward.

DO'S — WHAT MAKES A SUCCESSFUL EDUCATIONAL EVENT?

Clear Messaging	Make sure to describe your event as "educational" in your materials.
Meet in Public	Always hold educational events in a public space, not a private home or 1-on-1.
Deliver Knowledge	Educate consumers about Medicare, Medicare Advantage, Prescription Drug, or other Medicare Programs.
Follow-up Options	Leave behind business cards or collect "Consent to Contact" reply cards.
Brand Yourself	Use your name and image in your materials to establish your brand.
Use Event Templates	Start with materials that have been created with compliance in mind.

DON'TS — WHAT TO AVOID DURING EDUCATIONAL EVENTS

- **Consent to Contact is optional:** You cannot require attendees to complete a sign-in sheet or "consent to contact" cards.
- **Don't discuss plans:** Stay clear of specific plans or groups of plans.
- **Avoid benefits:** You cannot mention benefits available in plans (such as dental or give-backs).
- **No marketing after:** You cannot hold a marketing event after an educational event.
- **Don't forget CMS:** ALWAYS check compliance for everything in your content and event materials.

MORE TIPS FOR GREAT EDUCATIONAL EVENTS

- **Provide snacks or a meal:** You may provide food – at educational events only – if the value is $15 or less per person.
- **Build community:** Your friendly personality and authenticity helps you connect with attendees.
- **Offer nominal gifts:** You may give nominal items with your contact information, such as pens, notepads, et cetera.

With these guidelines and our available event planning materials, you'll be on your way to a successful Medicare educational event!

FOR AGENT USE ONLY. NOT FOR PUBLIC DISTRIBUTION.

Cornerstone Senior Marketing
AN INTEGRITY COMPANY