



# Welcome Manual



**TOGETHER  
WE CAN MAKE A  
DIFFERENCE**

**Brian Benedict, Regional Manager**  
Direct: (765) 277-2770  
Brian.Benedict@advocatehealthllc.com  
[www.advocateforagents.com](http://www.advocateforagents.com)

## INDEX

### WELCOME

- Mission. Vision. Core Values.
- Message From Darwin Hale
- Executive Team
- Regional Manager
- Agent Care Team
- Special Teams
- Commit, Learn. Succeed. Establish. Grow. Retain.
- Agent Support
- Marketing
- Digital Resources
- Advoquote
- "Need To Know" Book
- Veterans Initiative
- Advocate University



## WELCOME

We are an industry leading FMO in the Medicare market providing our agents and agencies with an unparalleled level of customized support and appreciation by leveraging our track record of success, best practices, national partnerships, and infrastructure.

Advocate Health Advisors agents and agencies grow and serve their clients while helping their communities live healthier, happier lives! We believe in providing agent support before, during, and after the sale.

## VISION

Working together to actively improve the health and quality of life for older Americans, families, and communities by moving from a focus on sickness and illness to one based on prevention and well-being.

## MISSION

Advocate Health Advisors provides an unparalleled level of customized support and appreciation to our agents and agencies by leveraging our track record of success, best practices, and national partnerships and infrastructure.

We help our agents succeed before, during, and after the sale by providing them access to quality products that promote consumer health and well-being. We operate in all 50 states and the Commonwealth of Puerto Rico.

**Brian Benedict, Regional Manager**  
**Direct: (765) 277-2770**  
**[Brian.Benedict@advocatehealthllc.com](mailto:Brian.Benedict@advocatehealthllc.com)**  
**[www.advocateforagents.com](http://www.advocateforagents.com)**



## CORE VALUES

- Trust
- Loyalty
- Competence & Proficiency
- Hard Work & Motivation
- Integrity

---

# Message From The CEO

Welcome to Advocate Health Advisors and congratulations on your decision to become a health and well-being advisor during this exciting and unprecedented time in our industry. With the advent of the Affordable Care Act, Medicare and Medicaid, more than 100 million people need advice - and 10,000 more turn 65 every day. They need and deserve a trusted professional like you. Serving your community while growing your business is a great way to earn a living and realize the American Dream!

Now is a critical time in your career and a defining moment toward your financial future. That is why we have taken the best practices of thousands of agents across the country and added a support package that provides what you need to succeed before, during, and after the sale. The main component to this comprehensive program is the Personalized Marketing Plan (PMP) and it will help you reach your financial objectives in a helpful and compliant manner.



**Darwin R. Hale**  
CEO & Founder, COL (RET), USAR

Your hard work combined with our relationships, support, and proven business model will help you start right and finish strong. The Key to your success is making your first sale shortly after graduation from certification school and creating a Personalized Marketing Plan (PMP).

Thank you for choosing Advocate Health Advisors. We look forward to a lasting and prosperous relationship.

Darwin

**“They need and deserve a trusted professional like YOU.”**

# Executive Team



**Alissa Morris**  
Comptroller &  
Compliance



**Charles Coldiron**  
Client Care Team  
Director



**Craig Thompson**  
Process & Performance  
Leader



**Cullen Wright**  
Veterans Initiative Program  
& Mid-Atlantic Director



**Jason Roll**  
Regional Director  
Northwest



**Jennifer Melreit**  
Agency Development  
Director



**Jerry Messina**  
Regional Director  
Northeast



**Kelly Roszel**  
Business Development  
Strategy Director



**Larry Carroll**  
Regional Director  
Midwest



**Mike Yasi**  
National Director  
DSNP Sales



**Shawn McGinty**  
Agency Development  
Manager



**Wendall Wells**  
Regional Director  
Southeast

# Regional Manager



**Brian Benedict**

After leaving the United States Army as a Sergeant (from 1986-1991), obtained his life and health license at 25 and went on to have a successful career as a Firefighter for the Richmond Indiana Fire Department. He retired in 2016 and continued protecting police officers and firefighters across the Midwest with Police & Firemen's Insurance Association, a fraternal organization. After 13 years with Police and Firemen's Ins Association he opened a successful State Farm Agency in Englewood Ohio.

Today, Brian is a Regional Manager for Advocate Health Advisors. He offers a unique opportunity for Agencies and Agents to Partner with him to take their businesses to the next level. He works closely with every Agent to help create a personalized business development plan. His sole focus is helping Agents be successful.

Brian also understands that trust and loyalty are not be given freely; they must be earned. Therefore, he focuses on honesty, combined with the knowledge and skills acquired over several decades to earn your trust and loyalty while helping you build a great business.

Brian lives in Indiana with his wife and teddy bear bichon. Brian and Lisa have three awesome children. Daughter Jessi is an Intelligence Lieutenant in the United States Army and currently serves in Germany. Their older son Skyler just graduated from Indiana University and is employed as a Data Analyst in Noblesville, IN. Dylan is graduating in 2022 from Purdue as a Software & Programming Engineer. Brian spends his spare time playing music in local establishments and together they love traveling and being outdoors with family and friends.

## "Together, we will do great things!"

**Brian Benedict, Regional Manager**

**Direct: (765) 277-2770**

**[Brian.Benedict@advocatehealthllc.com](mailto:Brian.Benedict@advocatehealthllc.com)**

**[www.advocateforagents.com](http://www.advocateforagents.com)**

# Agent Care Team (ACT)



**Amanda McCalden**  
Agent Services



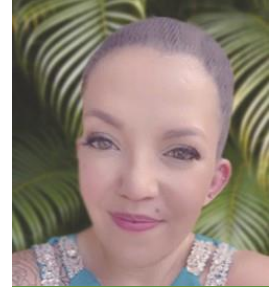
**Chrissy Greene**  
Commissions &  
Agent Services



**Elaine Scarfo**  
Agent Services



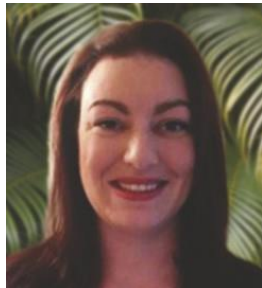
**Gericca Lamarr**  
Agent Services



**Jill Foley**  
Agent Services



**Kimberly Vaughan**  
Marketing Specialist



**Maureen Hart**  
Accounts Receivable  
& Agent Services



**Mysti Mejia**  
Contracting & Agent  
Services



**Nicole Swanson**  
Commissions &  
Agent Services



**Shannon Gedney**  
Contracting &  
Agent Services

The Advocate Health Advisors Agent Care Team (ACT) are licensed and certified insurance agents who are available to answer your questions and provide you with exceptional support. With collaborative efforts and common goals, our Agent Care Team completes tasks in the most efficient and effective way.

**Agent Care Team | Phone Number (800) 709-5513**

**WELCOME TO THE TEAM**

# Special Teams



**Bianca Padial**  
Talent Aquisition  
Specialist



**Jackleen Houchens**  
Retention Specialist



**Jinette Negron**  
Agent Services



**Josh Houchens**  
Data Analytics &  
Technology Specialist



**Katie Stanley**  
Project manager



**Leslie Moore**  
Financial Analysis



**Lidia Abudayeh**  
Engagement Marketing  
Specialist



**Lisa Robbins**  
Client Care Specialist



**Max Griendling**  
Digital Marketing  
Specialist



**Monica Martinez**  
Project Manager



**Omar Linton**  
Marketing Manager



**Shannon Davidson**  
Call Medicare Call  
Quality Coach



**Shekinah Draper**  
Call Center Manager



**Zonia Rattray**  
Compliance Associate





COMMIT. LEARN.  
**SUCCEED.**

## New To The Industry?

You just got your license and made the great choice to partner with, **Now What?**

**Contracting:** We hold top carrier contracts and help you avoid setbacks that can delay your processing time.

**Certification:** We will guide you to the necessary trainings and certifications required to sell a carrier's products, as well as provide outgoing education through Advocate University.

## Established Agent

You've worked hard to build your book of business for years.

### How can Advocate Health Advisors help you grow?

**Release:** We understand the rules of appointing us as your upline.

**Tools:** Gain exclusive access to our Electronic Resource Library and the Advoquote quoting tool.

**Support:** Let us take care of the administrative tasks, such as supply orders and status checks, so that your focus can remain on growing your clientele.



**ESTABLISH.**  
**GROW. RETAIN.**

## What's Your "Why"?

Let's talk about your goals and how we can reach them together with our marketing expertise.

- SEP Focus:** Dual Eligible, Special Needs Plans, T65 and more!
- Print Media:** Direct mail, flyers, business cards, newspaper ads, postcards and more!
- Event Guidance:** Formal & Informal sales events, educational, member only, community involvement and more!

## Keeping Your Word

The agent-member relationship does not stop at enrollment. We can help you take care of your clients.

- Retention:** Follow-up calls, ANOC events, newsletters and more!
- Referrals:** Book of business pulls for multiple carriers, letter guidance and mailing labels.
- Plan Benefits:** Member rewards programs, value added services, nurse hotlines, transportation services and more!

# AGENT SUPPORT

Advocate Health Advisors is an industry leading national FMO in the Medicare market. We provide our licensed sales agents and agencies with an unparalleled level of customized support and appreciation by leveraging our track record of success, best practices, national partnerships, and infrastructure.



## ADMINISTRATIVE SUPPORT

We perform back-office support to allow you to focus on growing your book of business and client retention.



## CARRIER RELATIONSHIPS

As a top national producer, our long-standing carrier relationships allow us to remove obstacles for you and your members. Your voice will not get lost in the crowd.



## COMMUNICATIONS

Stay informed! Advocate Health Advisors agent communications, monthly newsletter, and website will provide you with useful information, industry news, tools, resources, and references throughout the year.



## DIGITAL MARKETING

We have designed a digital marketing strategy specifically for licensed insurance agents interested in taking their business online like we did! Look for us on your favorite social platforms!



## EDUCATION & TRAINING

Advocate University offers in-person and virtual training such as webinars, newsletters, and events to sharpen your skills and boost your performance.



## LEADS & MARKETING

Learn the best practices to support your business plan and brand yourself in your community during AEP and the rest of the year (ROY).



## LIVE SUPPORT

Our friendly, licensed, and certified team answers your call on the first ring.



## MEMBER RETENTION

We teach you when and how to reach out to your clients, and help you do so. 80% of new sales come from your relationships with your current clients.



## ONLINE ENROLLMENT TOOLS

Our Enrollment Tools provide the features you want in a high performance, cloud-based system, using a consistent and compliant enrollment process all in one place.



## PERSONALIZED BUSINESS PLAN

We help you build a book of business and generate a stream of revenue while helping your community.

## FOLLOW US





# SAVE TIME ALL YEAR ROUND!

Advocate Health Advisors Medicare Enrollment Tool provides the features you want in a high performance, cloud-based system, using a consistent enrollment process for all your major carriers and the ability to view all plans in one place!



## ELECTRONIC ENROLLMENT

Send electronic comparisons to clients compliantly. Customers can sign in person using any touch screen device. You can email or text a request for a remote electronic signature & receive confirmation in real-time.



## PRESCRIPTION LOOKUP

Enter and save your customer's medications. Quoting is based on customer's total estimated annual cost. Compare plans available in customer's service area. Benefit detail, includes copays by medication, by month.



## SCOPE OF APPOINTMENT

Electronic Scope of Appointment workflow, that can be completed remotely.



## PERSONAL (PURL) WEBSITE

A personalized website to send to your customers with your phone number on the website, so if they have questions they will call you. If they self enroll, the enrollment is submitted under your credentials.



---

# MARKETING

Our marketing department at Advocate Health Advisors can assure you high quality marketing materials with a fast turnaround time.

Let our marketing team create custom pieces to help your business flourish while you stick to what you love doing.

## MARKETING FLYERS

If your marketing plan includes this approach, we provide personalized flyers and marketing materials for you.

We have compliant marketing materials ready to go so you don't have to waste time with approval delays, and you won't spend more than necessary on production costs.

We can either order the materials for you or you can print the approved, customized flyers right from your computer, so you always have what you need on hand to assist with making the sale.

## MAILERS

Mail reaches clients who may not have access to other methods of communication.

Since mail can also be designed to reach specific demographics and age bands, it can be tailored for consistent, year round lead generation during the Special Election Period. We can help you identify the best demographics to yield the best results.

Our proprietary pieces approved by core carriers ensure you're using mailers exclusive to Advocate Health Advisors. Through our relationships with preferred vendors this gives you access to volume purchasing discounts not available to the general public.



## LEAD GENERATION

Lead generation tailored to specific geographies and product lines.

Produced in real time, you'll have quick access to these leads. However, because not all leads are the same, we've developed select relationships with vendors. If your marketing plan includes lead generation, we'll provide insight into the vendors and preferred buying arrangements - services that are not necessarily available to the general public.

At Advocate Health Advisors, we're here to be your dedicated support system. Our bottom line is to improve yours.

## BUSINESS CARDS

Advocate Health Advisors offers 6 business card print options.

Please contact our marketing team for further instructions on how to obtain an order form.

[Marketing@advocatehealthllc.com](mailto:Marketing@advocatehealthllc.com)

# Digital Resources



[AdvocateHealthAdvisors.com](http://AdvocateHealthAdvisors.com)

Learn about our Legacy of Service and leadership, services, career opportunities, Advocate Health Advisors in the news, and our commitment to compliant business practices.



[AdvocateforAgents.com](http://AdvocateforAgents.com)

New to Medicare? Want to grow and serve your book of business with a partner that will support you every step of the way? Learn about our team, established carrier partnerships, footprint spanning the all 50 states and the Commonwealth of Puerto Rico, and benefits of partnering with an industry leading FMO in the Medicare market.



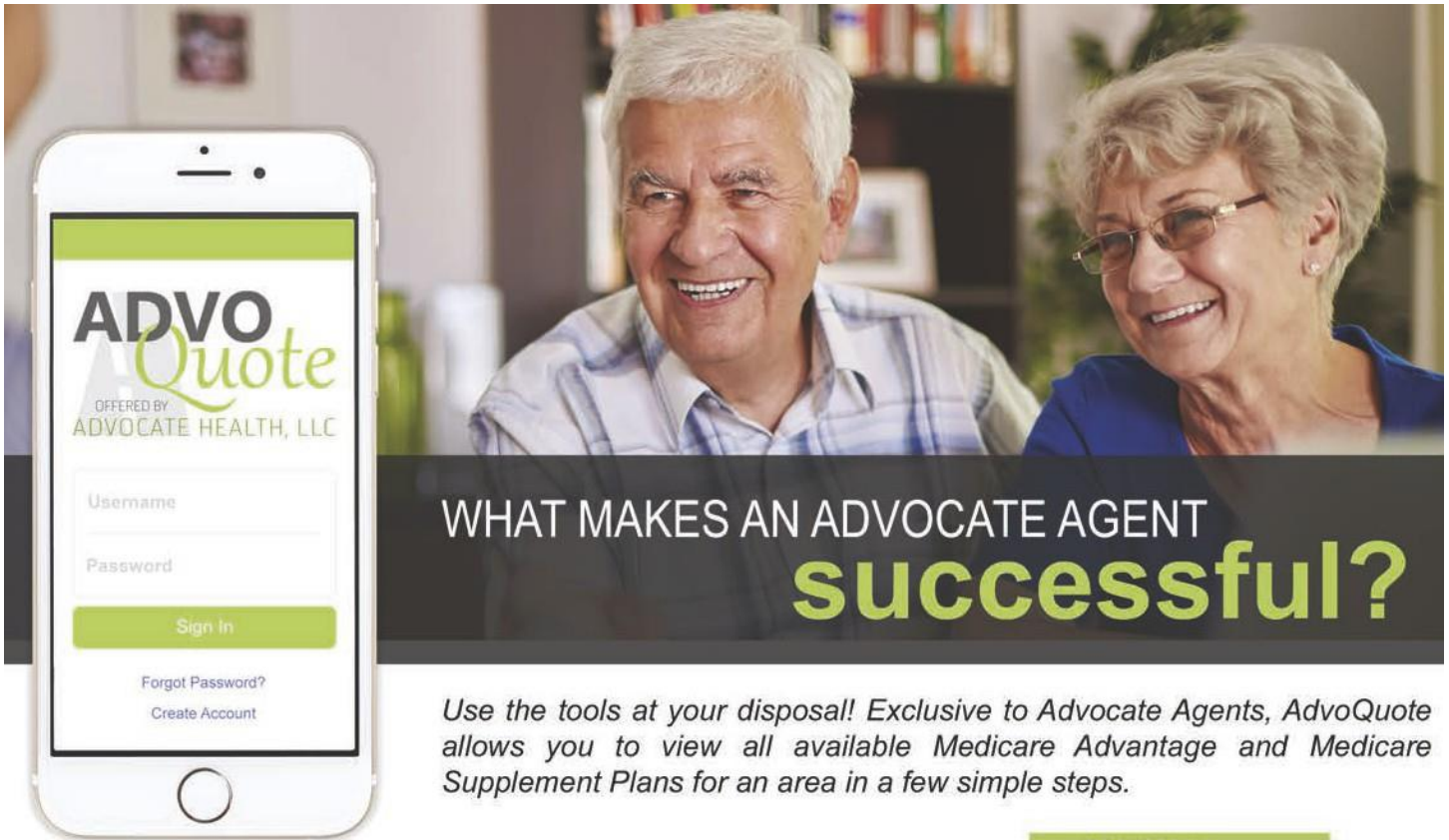
[AdvocateforClients.com](http://AdvocateforClients.com)

For 15 years our local licensed insurance agents, just like you, have been providing guidance to client with a focus on their specific healthcare needs. Americans turning 65, Veterans, current beneficiaries, and those who are dual eligible can access tools and resources to make informed choices about their Medicare plan.

## FOLLOW US





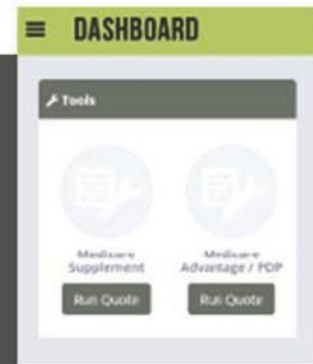


## WHAT MAKES AN ADVOCATE AGENT **successful?**

*Use the tools at your disposal! Exclusive to Advocate Agents, AdvoQuote allows you to view all available Medicare Advantage and Medicare Supplement Plans for an area in a few simple steps.*

1. Visit: [www.insurancetoolsportal.com/advocate/auth/signin](http://www.insurancetoolsportal.com/advocate/auth/signin)
2. Request an account
3. Verify your email address upon account approval
4. Run an AdvoQuote!

*\*A wireless connection is required to run quotes.*



Research, surveys, and focus groups have taught us that many of the great agents we serve share common traits. Here are some tips from our most successful agents:

### 1. "ANSWER YOUR PHONE."

Don't screen your calls or let your voicemail get full. A call from an unknown number may be a new lead or a current member who needs your help.

### 3. "BE PATIENT."

Take your time and be sure the member is comfortable with the information provided. Remember what it was like when you were first learning about Medicare and how confusing it can be. Your clients are often experiencing that same confusion!

### 2. "MAKE A CONNECTION."

A trusting relationship is established in the first impression. If you walk into an appointment with "commission breath", it could cost you the sale and any future referrals from the member.

### 4. "TAKE CARE OF YOUR CLIENTS"

Your relationship does not end after the enrollment is complete. Call to check in, send thank you and birthday cards, and make sure they know how to contact you if they have any questions or concerns regarding their policy.



# THE VETERANS INITIATIVE



## Veterans Helping Veterans

Advocate Health Advisors is Veteran owned and operated. Our mission is to help fellow Veterans with VA benefits and Medicare benefits and coordinate them to maximize care and minimize costs. Across the country, we help Veterans enjoy the peace of mind that comes from receiving the care they need at rates they can afford.

*If I can help a veteran with medical care and make sure as much money stays in their bank account as possible and as much care gets afforded to them as possible, then I have ticked another mission off as mission accomplished.*

- CULLEN WRIGHT, COL (RET), USAR, VETERANS INITIATIVES DIRECTOR

As fellow Veterans, it is also important to us to provide career opportunities to Veterans, transitioning and retiring Service Members, and Military Spouses interested in a career in the health insurance industry.



## Commitment to Service

For more information or to register to attend Advocate Health Advisors Veterans Initiative Program training, please email Regional Manager, Jason Luquire at [jason.luquire@advocatehealthllc.com](mailto:jason.luquire@advocatehealthllc.com)

To learn more about the guidance we provide to Veterans and their families, please visit us online at <https://www.advocateforclients.com/Home/Veterans>.

Follow Advocate for Veterans on Facebook





Get Connected and  
Stay Connected with

**Interactive Webinars  
and new online  
Agent Portal!**

# ADVOCATE UNIVERSITY

Advocate Health Advisors offers a unique opportunity for you to stay connected! Meet the Advocate team while engaging in interactive, meaningful training, share best practices, and network with other Advocate agents.

- Are you partnered with Advocate Health Advisors for one or more Medicare Advantage Carrier?
- Are you motivated to enter the Medicare Advantage industry with a strong desire to help people?
- Have you, or do you plan to complete the MAPD certification coursework required to represent MAPD products?

If so, you are a great candidate for our

**Interactive,  
Live, Virtual**

**Webinars!**



Hosted by:  
**Alissa Morris**



Contact me for upcoming events: (843) 240-4774

FOLLOW US

