

**JANUARY 2024**

S	M	T	W	T	F	S
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7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

# 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:

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**FEBRUARY 2024**

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# FEBRUARY

 **American Heart Association Month**

 **HIGHLIGHT OF THE MONTH:**

**Heart attack and stroke insurance**


 **REMINDERS:**

<ul style="list-style-type: none"> <li>Follow up with AEP clients and cross-sell ancillary products</li> </ul>	

 **IMPORTANT DATES:**


 **GOALS:**

<ul style="list-style-type: none"> <li>Contract with a new carrier that offers heart attack and stroke insurance</li> </ul>	

 **NOTES:** \_\_\_\_\_

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**MARCH 2024**

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<b>31</b>						

# MARCH

 **HIGHLIGHT OF THE MONTH:**

**Final expense insurance**

 **REMINDERS:**


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

 **IMPORTANT DATES:**

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

 **GOALS:**

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

 **NOTES:** \_\_\_\_\_  
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## APRIL 2024

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# APRIL



**National Volunteer Month**



**HIGHLIGHT OF THE MONTH:**

**Cross-selling**



## REMINDERS:

- Community involvement makes an effective marketing strategy



## 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:**

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|---|--|
| <ul style="list-style-type: none"> <li>• Look out for new maximum MA &amp; Part D broker commissions</li> </ul> | <ul style="list-style-type: none"> <li>• Start getting ready to take AHIP or NABIP certification training</li> </ul> |
| <ul style="list-style-type: none"> <li>• Ritter’s Summits registration opens!</li> </ul>                        |  |

 **IMPORTANT DATES:**


 **GOALS:**

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|---|--|
| <ul style="list-style-type: none"> <li>• Sell at least one dental, vision, and hearing plan this month</li> </ul> |  |
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 **NOTES:** \_\_\_\_\_  
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**JUNE 2024**

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# JUNE



**National Annuity Awareness Month**



**HIGHLIGHT OF THE MONTH:**

**Fixed annuities**



**REMINDERS:**

• Register for Ritter Summits	



**IMPORTANT DATES:**




**GOALS:**

• Pass AHIP or NABIP training	



**NOTES:**

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**JULY 2024**

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# JULY

 **HIGHLIGHT OF THE MONTH:**

**Hospital indemnity insurance**


 **REMINDERS:**

• Carriers' First Looks & product certifications become available	
• Register for Ritter Summits	

 **IMPORTANT DATES:**


 **GOALS:**

• Get a free portfolio review from your Ritter sales specialist	

 **NOTES:** \_\_\_\_\_  
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**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:**


 **GOALS:**

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

 **NOTES:** \_\_\_\_\_  
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**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:** \_\_\_\_\_  
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**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"> <li>• Activate all Shop &amp; Enroll direct enroll buttons for AEP</li> </ul>	

 **IMPORTANT DATES:**

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

 **GOALS:**

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

 **NOTES:** \_\_\_\_\_  
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**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:** \_\_\_\_\_  
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DECEMBER 2024						
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# DECEMBER

 **HIGHLIGHT OF THE MONTH:**

Year-end review

 **REMINDERS:**


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

 **IMPORTANT DATES:**

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

 **GOALS:**

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

 **NOTES:** \_\_\_\_\_  
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