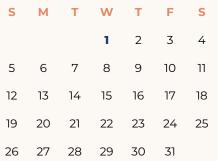


#### JANUARY 2025







**Dual Eligible Special Needs Plans** 

<b>© REMINDERS:</b>	
· D-SNPs can be sold year-round	
· Ritter's Med Supp 100K Giveaway begins	
· Update/renew E&O insurance	
<b>IMPORTANT DATES:</b>	
· January 1 – MA OEP start	
<b>© GOALS:</b>	
· Sell at least one D-SNP this month	
✓ NOTES:	



FEBRUARY 2025		
S M T W T F	s	BRUARY
	1 Amorio	an Haart Association Month
2 3 4 5 6 7	•	an Heart Association Month
9 10 11 12 13 14 16 17 18 19 20 21	15 HIGH	ILIGHT OF THE MONTH:
23 24 25 26 27 28		t attack and stroke insurance
<b>PREMINDER</b>	<b>S</b> :	
· Follow up with AEP cl	lients and	
cross-sell ancillary pro	oducts	
^		
<b>IMPORTAN</b>	T DATES:	
© COALC:		
<b>◎ GOALS:</b>		
· Contract with a new o	carrier that offers	
heart attack and strok	ke insurance	
MOTES:		



<b>MARCH 2025</b>								
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### **MARCH**

• HIGHLIGHT OF THE MONTH:

Final expense insurance

23 24 25 26 27 28 29		•
30 31		
30 31		
(0)		
<b>PREMINDERS:</b>		
· The average funeral costs be	etween	
\$7,000 and \$12,000		
<b>IMPORTANT D</b>	ATEC.	
WINDORIANI D	AIES.	
· March 31 – MA OEP ends		
<b>© GOALS:</b>		
· Strategize final expense sale	es with	
your Ritter sales specialist		
<b>☑</b> NOTES:		
LINOTES.		



#### **APRIL 2025** APRIL S 1 2 3 4 5 National Volunteer Month 7 10 12 6 8 9 11 **HIGHLIGHT OF THE MONTH:** 13 14 15 16 17 18 19 20 21 22 23 24 25 26 **Cross-selling** 27 28 29 30 **PREMINDERS:** · Community involvement makes an effective marketing strategy **IMPORTANT DATES: © GOALS:** · Volunteer in your local community · Follow up with five clients and look for a few hours for coverage gaps **MOTES:**



MAY 2025								
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Dental, vision, and hearing insurance

### **PREMINDERS:**

C REMINDERS.	
· Look out for new maximum MA & Part D broker commissions	Start getting ready to take AHIP     or NABIP certification training
· Ritter's Summits registration opens!	
<b>() IMPORTANT DATES:</b>	
© GOALS:	
· Sell at least one dental, vision, and	
hearing plan this month	
<b>☑</b> NOTES:	



#### **JUNE 2025**

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30

## JUNE





**Fixed annuities** 

(A) DEMINIDEDC.	
© REMINDERS:	
· Register for Ritter Summits	
<b>IMPORTANT DATES:</b>	
<b>© GOALS:</b>	
· Pass AHIP or NABIP training	
☑ NOTES:	



#### **JULY 2025**

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27	28	29	30	31		

### JULY



**Hospital indemnity insurance** 

REMINDERS:	
· Carriers' First Looks & product certifications become available	
· Register for Ritter Summits	
<b>•</b> IMPORTANT DATES:	
<b>© GOALS:</b>	
· Get a free portfolio review from your	
Ritter sales specialist	
✓ NOTES:	



#### **AUGUST 2025**

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## **AUGUST**

HIGHLIGHT OF THE MONTH:

**Prescription drug plans** 

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REMINDERS:	
· Summits are happening	
Submit new contracting ASAP     to avoid the pre-AEP rush	
<b>•</b> IMPORTANT DATES:	
<b>© GOALS:</b>	
· Add at least one new MA or Med Supp	
contract to your portfolio	
☑ NOTES:	



#### **SEPTEMBER 2025**

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### SEPTEMBER



**HIGHLIGHT OF THE MONTH:** 

Life insurance

<b>PREMINDERS:</b>	
· Summits are happening	
· Pre-order Medicare enrollment kits	
· Look out for the latest COLA info	
<b>•• IMPORTANT DATES:</b>	
<b>© GOALS:</b>	
· Pre-order Medicare enrollment kits	
☑ NOTES:	



#### **OCTOBER 2025**

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## OCTOBER

**☼** Breast Cancer Awareness Month

National Critical Illness Awareness Month



Cancer and critical illness insurance

### **© REMINDERS:**

Review all contracting statuses to ensure you're active and ready-to-sell with all products for AEP	
<b>IMPORTANT DATES:</b>	
October 1 – May begin discussing upcoming plans with clients	
· October 15 – AEP starts	
© GOALS:	
· Sell at least five Medicare plans within the first two weeks of AEP	
✓ NOTES:	



### NOVEMBER 2025

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### NOVEMBER

National Long-Term Care Awareness Month



Long- and short-term care insurance

### **PREMINDERS:**

Check for new Medicare Parts A and B costs	· Offer under-65 insurance to help Medicare clients' family members
<b>(1) IMPORTANT DATES:</b>	
· November 1 – Under-65 OEP starts	
· November 15 – Halfway through AEP	
<b>⊚</b> GOALS:	
· Watch ACA Basics training module	
in Knight School Path 2	
☑ NOTES:	



**MOTES:** 

## Months of Medicare At a Glance

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