

Welcome



2025 Medicare **MASTERY CONFERENCE**

Sharpen Your Skills, Strengthen Your Impact

September 16th, 2025

Optum
2304 Zanker Road
San Jose, CA





2025 Medicare **MASTERY CONFERENCE**



Welcome!

Welcome to the Medicare Mastery Conference!

We are grateful you chose to invest your time, energy, and attention with us today. By being here, you are not only preparing for a successful AEP, you are gaining insights for growing your business, connecting with providers and carriers, and building friendships within this amazing community.

A **huge shout out to our planning committee** whose efforts made this day possible- **Cathy Little, Irma Romero, Jennifer McKenzie, and Kamile Rocha**...especially **Michele Campbell** who used her great networking skills to bring this all together.

This conference is not only about education, but also about **community, collaboration, and fun**. So lean in, take notes, ask questions, network boldly, and most importantly—**enjoy yourself!**

May this day inspire you, prepare you, and remind you why you chose this profession: to make a difference in people's lives. Thank you again for joining us.

Here's to a day of learning, laughter, and **Medicare Mastery!**



Medicare **MASTERY CONFERENCE**



AGENDA

8:45-9:15am	Registration and Breakfast
9:15-9:25am	Welcome and Introduction
9:25-9:45am	Strategic Marketing to Professionals: Building Trust and Authority , presented by: Michele Campbell
9:50-10:10am	Meet Your New Best Friend Automation: Tools to Create Efficiency in Your Business Using AI and What's Already There for You , presented by: Elka Soussana
10:15-11:00am	Carrier Panel moderated by David Garcia with Sarah Endriss, SCAN; David Mulligan, Alignment; Esther Magnus, Aetna
11:00am-12:00pm	Current Events: Protecting & Preparing the Future of Independent Agents , presented by: Calvin Bagley
12:05-1:15pm	Lunch & Networking
1:20-2:15pm	OBBBA Budget Bill: Navigating the New Benefits Landscape - CE #392809 , presented by: Paul Roberts
2:15-2:25pm	CAHIP Legislative Update , presented by Faith Borges
2:25-2:35pm	PAC Update – Patrick Burns
2:35-2:45pm	Technology Updates with Good Samaritan
2:50-3:10pm	CAHIP The Mastery Behind the Mission with Dawn McFarland, CAHIP President
3:10-4:05pm	Agency Evolution: Build Smart, Scale Strategically & Exit Strategy - CE #392711 , presented by: Tim Kanter
4:05-4:15pm	Final Thoughts
4:15-5:30pm	Raffle Prizes and Networking Mixer



2025 Medicare MASTERY CONFERENCE



Thank You! Event Sponsors





2025 Medicare **MASTERY CONFERENCE**



Irma Romero, CAHIP Golden Gate President, 2025-26 Quick Learning School

Event Emcee

Irma Romero is an independent agent, educator and advocate for the insurance industry. As an agent, she currently serves clients in the Medicare and Covered California health insurance markets. As CEO and director of the Quick Learning School of Concord, she trains students to pass their state insurance licensing exams.

As an industry board member, she strengthens the voice of insurance agents and clients as she serves as CAHIP's VP of Membership (2022 - 2026), and President of the CAHIP Golden Gate chapter (2025 - 2026). Past leadership roles include Boards of Directors for the Silicon Valley (2016 - 2017) and Mt. Diablo (2009 - 2017) National Association of Insurance and Financial Advisors (NAIFA).

Outside of the insurance industry, Irma is a certified Yoga teacher and certified NLP trainer. In her extremely limited spare time, she can be found meditating in the desert and singing Karaoke (not in the desert).

QUICK LEARNING SCHOOL, LLC. Insurance | Securities | Real Estate

At Quick Learning School, we strive for every student to have a positive learning experience and to develop the skills necessary to pass the California State Insurance Exams the first time. Insurance prelicensing and exam prep available in classroom and online.

www.quicklearningschool.com

San Jose 408-453-8133
Concord 925-676-1526



Classroom



Blended Learning



Online

"We prepare you to pass your licensing exam the first time!"



2025 Medicare **MASTERY CONFERENCE**



David Garcia,
CAHIP Ventura County President, 2025-26
Warner Pacific

Event Emcee, Carrier Panel Moderator

David Garcia is the Senior Medicare Sales Consultant for Warner Pacific Insurance Services, one of California's top health insurance General Agencies and the Local Chapter President for CAHIP - Ventura.

David is committed to educating agents about the opportunities available in our nation's Baby Boomer market and exposing opportunities available to agents within their community, network and book of business. He has the ability to simplify the Senior Sale by properly identifying the correct Medicare solution for each client and arming agents with the tools they need to remain compliant.

David began his career in the insurance industry in 1998 as a member of the Senior Sales Support team at Blue Cross of California (now Anthem), and has held various roles in support of agent sales since then.

A certified CrossFit L2 trainer, athlete and coach at CrossFit Kerosene, David resides in Newbury Park, California, with his wife and two sons Aiden and Ashton and 4-legged son Apollo.



JACK SCHROEDER
AND ASSOCIATES, LLC



IGNITE YOUR SUCCESS

AEP 2026

ASK US
ABOUT
CORE
CRM



YOUR WESTERN SALES TEAM

ADDRESS 111 WEST OCEAN BOULEVARD,
SUITE 1230, LONG BEACH, CA 90802
NEW BUSINESS FAX 1.877.545.2070



ZACHARY COPELAND
Sales Director,
Western Region

O 562.676.4622
M 206.795.8377
E ZCopeland@JSAonline.com



TAYLOR BROUGH
Vice President of Sales,
Western Region

O 562.676.4605
M 317.730.6225
E TBrough@JSAonline.com



JACELYN ALVAREZ
Sales Representative,
Western Region

O 562.676.4608
M 562.486.9770
E JAlvarez@JSAonline.com



ROSA M. PHILLIPS, MBA
Business Development,
Western Region

O 562.676.4612
M 818.456.8418
E RPhillips@JSAonline.com



CHARISSA WILLIAMS
Sales Representative,
Western Region

O 562.676.4623
M 360.723.4605
E CWilliams@JSAonline.com

STOP BY & SEE US @ BOOTH 69/70 • JSAONLINE.COM • 800.203.0433



2025 Medicare **MASTERY CONFERENCE**



Michele Campbell, MC Insurance Services

Strategic Marketing to Professionals: Building Trust and Authority

I believe in one simple principle: treat people the way I want to be treated. That Golden Rule guides everything I do—and it works. Since becoming an Independent Agent in 2006, I've built a thriving Medicare-focused agency with over 3,200 clients, a stellar team of seven, and a successful downline of agents. My HR Benefits background and 40+ years in insurance fuel my passion for helping people navigate coverage with clarity and care.

Connection is what drives me. Whether mentoring fellow agents, hosting Medicare webinars, or collaborating with HR teams and financial professionals, my goal is always to make the process easier and more impactful—for everyone involved.

I'm proud to have served on the AARP/UnitedHealthcare Agent Advisory Council, where I was honored as the first Woman Co-Chair. That experience deepened my commitment to advocacy and education in the Medicare space.

Outside of work, I'm a dedicated Rotarian and longtime member of the Gilroy Chamber of Commerce and Downtown Business Association. I'm also a proud mom to two adult children—including my daughter Majesta, who works alongside me—and a joyful "Nana" to three amazing grandchildren. When I'm not helping clients, you'll find me painting, traveling, walking, or tending to my heirloom oxheart tomatoes in the garden.



**JACK SCHROEDER
AND ASSOCIATES, LLC**



2025 Medicare **MASTERY CONFERENCE**



Paul Roberts, Word & Brown **OBBBA Budget Bill: Navigating the** **New Benefits Landscape #39280**

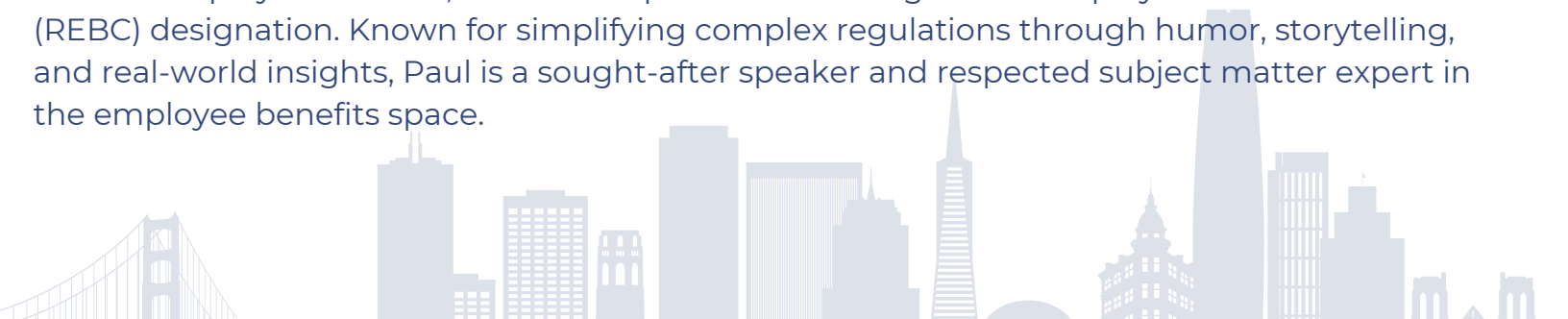
Paul Roberts is the Senior Director of Education at Word & Brown General Agency, a leading partner to group insurance brokers and employers in California and Nevada.

With nearly two decades of industry experience, Paul is nationally recognized for his expertise in health insurance legislation and compliance, as well as his engaging, relatable presentation style.

Paul Roberts is the Senior Director of Education at Word & Brown General Agency, a leading partner to group insurance brokers and employers in California and Nevada. With nearly two decades of industry experience, Paul is nationally recognized for his expertise in health insurance legislation and compliance, as well as his engaging, relatable presentation style. At Word & Brown, he leads compliance and educational initiatives that equip brokers and employers with the knowledge needed to navigate today's complex benefits landscape.

In addition to his role at Word & Brown, Paul is an influential voice in the national health insurance industry. He serves on the Legislative Council and Employer Working Group for the National Association of Benefits and Insurance Professionals (NABIP), where he works closely with lawmakers and regulators on issues impacting employer-sponsored health plans. He also serves as Vice President of Legislation for the California Agents and Health Insurance Professionals (CAHIP), overseeing statewide advocacy and legislative engagement.

Paul was honored with NABIP's Legislative Achievement Award in 2025 and is the creator and instructor of the nationally acclaimed NABIP certification course, "ACA & Beyond: A Modern Look at Employee Benefits," a core component of the Registered Employee Benefits Consultant (REBC) designation. Known for simplifying complex regulations through humor, storytelling, and real-world insights, Paul is a sought-after speaker and respected subject matter expert in the employee benefits space.



**JACK SCHROEDER
AND ASSOCIATES, LLC**

MC INSURANCE SERVICES

TOP TEAM, BIG WINS. JOIN US.



MARKETING & SALES SUPPORT

Marketing, compliance & sales teams to support you with your business growth & vision.



TOP INDUSTRY PLATFORMS, TOOLS & RESOURCES

Connecture DRX, AgencyBloc & more. Custom templates & resources for MC Partners only.



INDEPENDENT CONTRACTS W/ TOP CARRIERS

You'll have access to our direct contracts with industry leading products.

408-848-2271

mcinsurance.com

michele@mcinsurance.com

SELL A MEDICARE ADVANTAGE PLAN THAT PAYS CMS MAXIMUM ALLOWED

- Book Of Business Protection to safeguard your pipeline
- Commissions paid at the highest CMS-approved rate
- Telephonic and In-Market Broker Support
- State of the art Producer Portal
- Sell year-round with SCAN's Chronic Condition Plans

To get started, scan the QR code:



www.scanhealthplan.com

scan Medicare Advantage



SCCIPA operates like a clinic without walls, linking patients and health plans with our established network of physicians, hospitals, lab, x-ray, physical therapy and other providers. Based in San Jose, SCCIPA links over 1,000 physicians who practice independently throughout Santa Clara County, with 200 primary care physicians and over 800 specialists practice at most local hospitals. SCCIPA offers care with a purpose.

SCCIPA Member Benefits

- Care concierge program and complex care management
- Wide range of medical, surgical, and support services at locations throughout Santa Clara County. Get access to the most advanced specialized services and technologies in:
 - Family Practice
 - Internal Medicine
 - Obstetrics
 - Women's Health
 - Heart and Vascular
 - Orthopedics
 - Neurology
 - Cancer
- Visit SCCIPA.com, or call 800-977-7332 for assistance in finding doctors and to learn about available services. Se habla español.

SCCIPA
Santa Clara County IPA



2025 Medicare **MASTERY CONFERENCE**



Elka Soussana, Simpler Horizons

Meet Your New Best Friend Automation: *Tools to Create Efficiency in Your Business Using AI and What's Already There for You*

Elka Soussana, the driving force behind Simpler Horizons Insurance Solutions, a thriving senior general agency boasting over 100 independent agents. Currently serving as the Vice Chair for the CAHIP-LA Medicare board and as an advisor for the Foundation for Senior Services, Elka is a respected figure in the insurance and senior services sectors. Since making her mark in the Medicare space in 2012, she has skillfully navigated its complexities, ensuring both her agents and the seniors they serve can make informed choices.



Esther Magnus, Aetna

Carrier Panel

Esther Began her career as an early childhood educator, sharing knowledge and inspiring students.

After several fulfilling years in education, she decided to pivot into the insurance industry, managing individual, family, senior, and small group service and sales for a large employee benefits firm

After seven years on the benefit side to the business, she transitioned to the Broker Manager role at Aetna, where her skills have helped her thrive in educating our Broker community.

Outside of work, Esther enjoys spending quality time with family, particularly her niece and nephew. She also finds joy in snowboarding, reading, practicing Pilates, and embracing a lifestyle that balances work and personal passions.



2025 Medicare **MASTERY CONFERENCE**



David Mulligan, Alignment Health Plans Carrier Panel

David brings 25 years' experience to the Medicare Advantage industry with a career spanning member retention, sales compliance, marketing and most notably sales leadership.

Throughout his career, he has driven significant growth at leading organizations such as PacifiCare/Secure Horizons, Bravo Health and SCAN Health Plan. Currently, David serves as the Senior Vice President of Sales for California at Alignment Health Plan where he continues to lead with a results-driven approach and a commitment to innovation in healthcare.

He holds both Bachelors and Master's degrees in Business.



Sarah Endriss, SCAN Carrier Panel

Having gained experience in several facets of healthcare, including hands-on patient care and 10+ years in Medicare, Sarah has been able to see where current healthcare deficits are and is determined to be an active part of the solution.

She strives to implement inclusive quality healthcare and healthcare education to underserved communities. Most recently, she has joined the non-profit SCAN Health Plan as the Director of Sales for Northern and Central California where she has built out a top-notch local support team for the broker community and is leading SCANs expansion into additional markets.



WELCOME TO A NEW ERA OF AGING.

At Alignment Health, we are
champions of aging well.



Alignment Health Plan®



alignmenthealthplan.com

Alignment HealthPlan is an HMO, HMOPOS, HMOC-SNP, HMOD-SNP and PPO plan with a Medicare contract and a contract with the California, Nevada, North Carolina and Texas Medicaid programs. Enrollment in Alignment Health Plan depends on contract renewal.



2025 Medicare MASTERY CONFERENCE



Calvin Bagley

Current Events in Medicare - Protecting and Preparing for the Future of Independent Insurance Agents

Calvin Bagley is a visionary and strategic thinker who is driving innovation and client-focused solutions in Medicare insurance. He founded and is the President of Nuvo Health, which has facilitated more than 60,000 client enrollments in health and Medicare insurance.

He has actively advocated for Medicare insurance agents with congressional representatives and CMS policymakers. Calvin lives in the incredible city of Las Vegas, NV with his wife and two children. He is an avid traveler and has visited all 50 states and all seven continents.

Your Partner in Advanced Senior Care



Serving the South Bay for nearly 60 years



474 beds and over 1,100 physicians



Conveniently located off Hwy 85 & 17 in San Jose, near Los Gatos



Comprehensive Stroke Center & County-Designated STEMI Receiving Center



Accepts most Medicare plans



Building a \$1.3B new hospital for the future of care



Advanced Technology:

- Robotic-assisted surgery
- Focused Ultrasound for Essential Tremors and Liver Tumors (non-invasive)



Excellence in Care:

- Nationally Recognized and State Top Performer for Hip, Knee Replacement and Spine Surgery
- Cancer Care, Vascular Care, Ophthalmology
- Inpatient Rehabilitation & Behavioral Health - PHP/IOP and Older Adult programs

Good Samaritan Hospital – Where innovation meets compassionate care.



**GOOD
SAMARITAN
HOSPITAL**



2025 Medicare **MASTERY CONFERENCE**



Dawn McFarland, CAHIP President 2025-26 **CAHIP: The Mastery Behind the Mission**

Dawn McFarland, Founder and President of M&M Benefit Solutions Insurance Services, proudly serving the greater Los Angeles area. She entered the health and life insurance industry in 2012, just before the ACA rollout, and helped over 400 individuals navigate Covered California in its first year. That leap became one of the most rewarding decisions of her life—building a business rooted in ethics, service, and real impact.

She's held leadership roles with NABIP (formerly NAHU), including President of the Los Angeles Chapter and now President of CAHIP. Along the way, Dawn earned honors like the NAHU Distinguished Service Award and the Legislative Achievement Award, and she has served on the NAHU Medicare Advisory Council to advocate for clients nationwide.

Beyond insurance, Dawn is a certified community educator for the Alzheimer's Association—a cause close to her heart. Whether she's mentoring agents, guiding families through coverage decisions, or supporting her community, her passion lies in helping people understand their options and make confident, informed choices. Treat it like a math problem—and find the solution.



**JACK SCHROEDER
AND ASSOCIATES, LLC**

Not a Member?!
Join Now!



astiva
HEALTH

**PART B
REBATE**

\$165
/MONTH

2026

Servicing:
SANTA CLARA COUNTY



2025 Medicare **MASTERY CONFERENCE**



Tim Kanter, InsZone Insurance

**Agency Evolution: Build Smart, Scale
Strategically, Exit Strategy - CE Approved,
Course Number: 392711**

Tim has spent more than 30 years in the insurance industry, while bringing a wealth of experience in launching and scaling initiatives across both the insurance and non-profit sectors. He built a multi-million-dollar insurance agency, negotiated and integrated acquisitions, and coached other agencies and businesses through their own growth.

Beyond insurance, he founded a nationally impactful non-profit, created thriving divisions within multiple non-profits, and led sales and marketing for a start-up that grew into a multi-million-dollar enterprise. At the end of 2024, Tim's agency merged with InsZone Insurance, where he continues to thrive.

He is a dedicated nine-year member of NABIP and a past president of NABIP California (CAHIP). Tim is passionate about helping people reach their next level. He also actively supports causes close to his heart, including Free Wheelchair Mission and Children's Hunger Fund.

Several years ago, Tim fulfilled a childhood dream of becoming both an insurance agent and a ninja - earning his black belt in To-Shin Do (pronounced "toe-sheen-doe") and adopting the title "Insurance Ninja." A lifelong Ventura County resident, he enjoys time with his wife, daughters, son-in-law, and "all their pets." In his free time, you'll often find him backpacking in national parks, traveling to new destinations, or taking dance classes with his wife.



**JACK SCHROEDER
AND ASSOCIATES, LLC**

*Thank you
for coming!*



2025 Medicare **MASTERY CONFERENCE**

Sharpen Your Skills, Strengthen Your Impact

