

JANUARY 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 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:

FEBRUARY 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | | |

FEBRUARY

 **American Heart Association Month**

 **HIGHLIGHT OF THE MONTH:**

Heart attack and stroke insurance

 **REMINDERS:**

- Follow up with AEP clients and cross-sell ancillary products

 **IMPORTANT DATES:**

 **GOALS:**

- Contract with a new carrier that offers heart attack and stroke insurance

 **NOTES:**

MARCH 2024

| S | M | T | W | T | F | S |
|-----------|----|----|----|----|----|----|
| | | | | | 1 | 2 |
| 3 | 4 | 5 | 6 | 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 | | | | | | |

MARCH



HIGHLIGHT OF THE MONTH:

Final expense insurance



REMINDERS:

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



IMPORTANT DATES:

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



GOALS:

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



NOTES:

APRIL 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | | | | |

APRIL



National Volunteer Month



HIGHLIGHT OF THE MONTH:

Cross-selling

 **REMINDERS:**

• Community involvement makes an effective marketing strategy

• Attend Ritter's Senior Market Symposium

 **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

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 | 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 | |

MAY

 **HIGHLIGHT OF THE MONTH:**

Dental, vision, and hearing insurance

 **REMINDERS:**

- Look out for new maximum MA & Part D broker commissions

- Start getting ready to take AHIP or NABIP certification training

 **IMPORTANT DATES:**

| | |
|--|--|
| | |
| | |
| | |

 **GOALS:**

- Sell at least one dental, vision, and hearing plan this month

| | |
|--|--|
| | |
| | |

 **NOTES:**

JUNE 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | | | | | | |

JUNE



National Annuity Awareness Month



HIGHLIGHT OF THE MONTH:

Fixed annuities



REMINDERS:

• Ritter's Summits registration opens!



IMPORTANT DATES:



GOALS:

• Pass AHIP or NABIP training



NOTES:

JULY 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 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 | | | |

JULY

 **HIGHLIGHT OF THE MONTH:**

Hospital indemnity insurance

 **REMINDERS:**


| | |
|---|--|
| <ul style="list-style-type: none"> • Carriers' First Looks & product certifications become available | |
| | |
| | |

 **IMPORTANT DATES:**

| | |
|--|--|
| | |
| | |
| | |

 **GOALS:**

| | |
|---|--|
| <ul style="list-style-type: none"> • Get a free portfolio review from your Ritter sales specialist | |
| | |
| | |

 **NOTES:** _____

AUGUST 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 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 |

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:** _____

SEPTEMBER 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | | | | | |

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:** _____

OCTOBER 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 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 | | |

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"> • Activate all Shop & Enroll direct enroll buttons for AEP | |
| | |
| | |



IMPORTANT DATES:

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



GOALS:

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



NOTES: _____

NOVEMBER 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| | | | | | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |

NOVEMBER

 **National Long-Term Care Awareness Month**

 **HIGHLIGHT OF THE MONTH:**

Long- and short-term care insurance

 **REMINDERS:**


| | |
|--|---|
| <ul style="list-style-type: none"> • Check for new Medicare Parts A and B costs | <ul style="list-style-type: none"> • Offer under-65 insurance to help Medicare clients' family members |
| | |

 **IMPORTANT DATES:**

| | |
|---|--|
| <ul style="list-style-type: none"> • November 1 – Under-65 OEP starts | |
| <ul style="list-style-type: none"> • November 15 – Halfway through AEP | |
| | |

 **GOALS:**

| | |
|--|--|
| <ul style="list-style-type: none"> • Watch ACA Basics training module in Knight School Path 2 | |
| | |

 **NOTES:** _____

DECEMBER 2024

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| 1 | 2 | 3 | 4 | 5 | 6 | 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 | | | | |

DECEMBER

 **HIGHLIGHT OF THE MONTH:**

Year-end review

 **REMINDERS:**


| | |
|--|--|
| • Follow up with your AEP clients a few weeks after AEP ends | |
| • First-eligible MA clients have a trial right | |

 **IMPORTANT DATES:**

| | |
|-------------------------|--|
| • December 7 – AEP ends | |
| | |
| | |

 **GOALS:**

| | |
|--|--|
| • Develop your follow-up strategy for the new year | |
| | |

 **NOTES:** _____

