

# Senior Summit

**Tuesday, September 9, 2025 – Day 1**

7:30 to 9:30 AM	<b>Sunrise Continental Breakfast</b> Breakfast Partner: AgentMethods	Summit A, B, C Foyers
8:00 AM to 5:00 PM	<b>Registration</b>	Summit Registration A, B
9:00 to 9:25 AM	<b>Senior Summit Welcome, Opening Comments, Introduction of Dignitaries</b> Maggie Stedt, CSA, LPRT; Yolanda Webb, CHRS; Ricky Haisha, LUTCF, Summit Co-Chairs	Summit C
<b>Education Sessions (Choose One)</b>		
9:30 to 10:30 AM	<b>OBBBA Budget Bill: Navigating the New Benefits Landscape [CE: 392809]</b> Speaker: Paul Roberts, Word & Brown	Summit A
	<b>Cyber Risk, Cybersecurity &amp; Insurance [CE: 390236]</b> (This course does not satisfy the mandatory one-hour CA DOI Anti-Fraud requirement.) Speakers: Adriana Mendieta, Tech Coordinator Cybersecurity Insurance Solutions, and Carl Grifka, SingerLewak	Summit B
	<b>The Fraud Squad and You [CE: 392640]</b> (This course <i>satisfies</i> the mandatory one-hour CA DOI Anti-Fraud requirement.) Speaker: Bobbi Kaelin, PayProtpa.com	Summit C
10:30 to 11:15 AM	<b>Platinum Ribbon Partner Welcome: AGA, Alignment Health Plan, and SCAN Health Plan</b>	
11:00 to 11:30 AM	<b>Morning Coffee</b> Coffee Partner: Primary Care Associates of CA	Summit A, B, C Foyers
11:20 AM to 12:20 PM	<b>Heard on the Street: Our Wins at NABIP, Medicare Legislative Outlook and Challenges</b> Panelists: Calvin Bagley, Nuvo Health; Faith Borges, Public Policy Partnership; Amanda Brewton, Medicare Answers Now; Dwane McFerrin, Senior Market Sales, and Nick Uehlecke, Todd Strategy Group	Summit C
12:30 to 1:50 PM	<b>Lunch – Plated / Table Service</b> Lunch Partner: Senior Market Sales	Summit D, E
12:30 to 5:00 PM	<b>Exhibit Hall Open</b>	Grand Ballroom
2:00 to 2:50 PM	<b>Our Wins with NABIP and CAHIP</b> Panelists: Calvin Bagley, Nuvo Health; Chalen Jackson, Senior Marketing Specialists; Dawn McFarland, CAHIP President, and Susan Rider, NABIP President	Summit C
3:30 to 3:50 PM	<b>Grab a Snack</b> Break Partner: L A Care Health Plan	Summit A, B, C Foyers
<b>Education Sessions (Choose One)</b>		
4:00 to 5:00 PM	<b>Employer Benefits vs Medicare Benefits, Should Your Employees Stay or Should They Go? [CE: 356191]</b> Speakers: Mary King and David Garcia, Warner Pacific Insurance Services	Summit A
	<b>Agency Evolution: Build Smart, Scale Strategically, Exit Strong [CE: Pending]</b> Speaker: Tim Kanter, Inszone Insurance Services	Summit B
	<b>Aging Population and Serving/Servicing Ethically [CE: Pending]</b> (This course does not satisfy the mandatory one-hour CA DOI Anti-Fraud requirement.) Speaker: Bobbi Kaelin, PayProtpa.com	Summit C
5:00 PM	<b>Dinner on Your Own</b>	

## Wednesday, September 10, 2025 – Day 2

7:00 AM to 12 PM	<b>Registration</b>	Summit Registration A, B
7:30 to 9:30 AM	<b>American Morning Breakfast Buffet</b> Breakfast Partner: AltaMed	Summit A, B, C Foyers
7:30 AM to 12:30 PM	<b>Exhibit Hall Open</b>	Grand Ballroom
<b>Education Sessions (Choose One)</b>		
8:30 to 9:30 AM	<b>AI: From Concept to Reality</b> Speaker: Korey Ashton, Kizen	Summit A
	<b>Increase Your Revenue thru the Employee Benefits Market</b> Speakers: Maura Zamarripa and Karen De Leon, Amwins Connect	Summit B
	<b>Doing Right and Selling Right is Ethical [CE: 392707]</b> (This course does not satisfy the mandatory one-hour CA DOI Anti-Fraud requirement.) Speaker: Bobbi Kaelin, PayProtpa.com	Summit C
9:35 to 9:40 AM	<b>Welcome and Orders of the Day</b> Maggie Stedt, CSA, LPRT; Yolanda Webb, CHRS; Ricky Haisha, LUTCF, Summit Co-Chairs	Summit C
9:40 to 10:15 AM	<b>Medicare Legislative Outlook &amp; Challenges</b> Panelists: Calvin Bagley, Nuvo Health; Amanda Brewton, Medicare Answers Now; Dwane McFerrin, Senior Market Sales; Susan Rider, NABIP President and Nick Uehlecke, Todd Strategy Group	Summit C
10:20 to 10:25 AM	<b>Membership and PAC Minute</b>	Summit C
10:30 to 10:55 AM	<b>E &amp; O Panel Discussion</b> Panelists: To Be Announced	
11:00 to 11:25 AM	<b>PDP Sales Dilemma: To Sell or Not to Sell, that is the Question</b> Panelists: Austin Felch, AGA; Matt Fletcher, MF Insurance Services; Tamie Mongold, Shop N Health Insurance Agency, and Henry Romero, HRBC Insurance	Summit C
11:00 to 11:30 AM	<b>Morning Coffee</b> Coffee Partner: Aetna Medicare	Summit A, B, C Foyers
11:30 to 11:50 AM	<b>Washington, DC Update: An Insider Conversation</b> Speaker: Nick Uehlecke, Todd Strategy Group	Summit C
11:55 AM to 12:30 PM	<b>Mentalist Program</b> Mentalist: Michael Gutenplan	Summit C
12:30 to 1:50 PM	<b>Exhibit Hall Closed</b>	Grand Ballroom
12:30 to 1:50 PM	<b>Lunch – Plated / Table Service</b> Lunch Partner: Blue Zones Health	Summit D, E
2:00 to 2:50 PM	<b>Understand GI and How to Underwrite Your Med Supp Case</b> Carrier Panelists: To Be Announced	Summit C
2:00 to 5:00 PM	<b>Exhibit Hall Open</b>	Grand Ballroom
3:00 to 3:15 PM	<b>Energizer Break</b> Break Partner: Enable Dental	Summit A, B, C Foyers
3:00 to 3:50 PM	<b>How Agents and Providers Can Work Together: A Panel Presentation</b> Panelists: To Be Announced	Summit C
<b>Education Sessions (Choose One)</b>		
4:00 to 5:00 PM	<b>Digital Marketing Unlocked: Turning Chaos into a Clear Plan</b> Speaker: Danyi Galligan, AgencyBloc	Summit A
	<b>Technology for the Medicare Agent/Agency</b> Speakers: Henry and Nico Romero, HRBC Insurance Services	Summit B
	<b>Help Your Clients Live Better, Longer with Blue Zones Health</b> Speakers: Alex Barajas, Dr. Dipika Pandit, MD, MPH, and Joan Varini	Summit C
5:00 PM	<b>Dinner on Own</b>	

## Thursday, September 11, 2025 – Day 3

7:30 AM to 12:00 PM	<b>Exhibit Hall Open</b>	Grand Ballroom
8:00 to 10:00 AM	<b>Registration</b>	Summit Registration A, B
8:00 to 10:00 AM	<b>Santa Rosa Breakfast Buffet</b> Breakfast Partner: Champion Health Plan	Summit A, B, C Foyers
8:50 to 9:00 AM	<b>Welcome and Orders of Day</b> Maggie Stedt, CSA, LPRT; Yolanda Webb, CHRS; Ricky Haisha, LUTCF, Summit Co-Chairs	Summit C
9:00 to 9:40 AM	<b>2026 Alignment Health Plan First Look and Product Overview</b> Speaker: To Be Announced	
9:45 to 10:25 AM	<b>2026 SCAN Health Plan First Look and Product Overview</b> Speaker: To Be Announced	
10:30 to 11:10 AM	<b>2026 Molina Healthcare and Central Health Plan First Look and Product Overview</b> Speaker: To Be Announced	
10:30 to 11:15 AM	<b>Morning Coffee</b> Coffee Partner: Quotit	Summit A, B, C Foyers
10:00 to 10:55 AM	<b>2026 Humana First Look and Product Overview</b> Speaker: To Be Announced	
12:00 PM	<b>Exhibit Hall Closed</b>	Grand Ballroom
12:00 to 12:50 PM	<b>Lunch – Plated / Table Service</b> Lunch Partner: Kizen	Summit D, E
1:00 to 1:40 PM	<b>2026 Wellcare First Look and Product Overview</b> Speaker: Todd Alvarez, Wellcare	
1:45 to 2:15 PM	<b>2026 Champion Health Plan First Look and Product Overview</b> Speaker: To Be Announced	
2:20 to 2:50 PM	<b>2026 Aetna Medicare First Look and Product Overview</b> Speaker: To Be Announced	
2:40 to 3:10 PM	<b>Sports Break</b> Break Partner: The Brokerage	Summit A, B, C Foyers
3:00 to 3:25 PM	<b>2026 UnitedHealthcare First Look and Product Overview</b> Speaker: Rodney Gale, UnitedHealthcare	
3:30 to 3:55 PM	<b>2026 Anthem Blue Cross Medicare First Look and Product Overview</b> Speaker: Krystal Spindler, Anthem Blue Cross Medicare	
4:00 to 4:25 PM	<b>2026 Blue Shield of CA First Look and Product Overview</b> Speaker: To Be Announced	
4:30 to 5:00 PM	<b>Closing Statements, Membership Results, Awards &amp; Grand Prize Raffle Announcement</b> Grand Prize Partner Presentation: Regal Medical Group, Lakeside Community Healthcare, ADOC Medical Group	
5:00 PM	<b>The End – Thank You for Attending the Senior Summit – See You in 2026!</b>	

**\*ALL DAY 3 SESSIONS ARE HELD IN SUMMIT C\***