

# Senior Summit

## Tuesday, September 1, 2026 – Day 1

|                           |                                                                                                                                                                                                                 |                                      |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| 8:30 to 11:00 AM          | <b>Morning Coffee</b><br>Coffee Partner: Anthem                                                                                                                                                                 | Upper Concourse                      |
| 9:00 AM to 5:00 PM        | <b>Registration</b>                                                                                                                                                                                             | Upper Concourse                      |
| 10:00 AM to 12:00 PM      | <b>Exhibit Hall Open</b>                                                                                                                                                                                        | Ben H. Lewis Hall, Exhibit Hall C, D |
| 12:00 to 1:00 PM          | <b>Lunch (Plated)</b>                                                                                                                                                                                           | Ben H. Lewis Hall, Exhibit Hall A, B |
| 1:00 to 1:30 PM           | <b>Welcome and Orders of the Day</b><br>Maggie Stedt, CSA, LPRT; Yolanda Webb, CHRS; Ricky Haisha, LUTCF, Summit Co-Chairs                                                                                      |                                      |
| 1:00 to 5:00 PM           | <b>Exhibit Hall Open</b>                                                                                                                                                                                        | Ben H. Lewis Hall, Exhibit Hall C, D |
| 1:30 to 2:20 PM           | <b>Platinum Ribbon Partner – Alignment Health Plan</b>                                                                                                                                                          |                                      |
| 2:20 to 2:35 PM           | <b>Silver Sneakers® Stretch Break</b>                                                                                                                                                                           |                                      |
| 2:35 to 3:00 PM           | <b>Snack Break</b><br>Break Partner: Aetna Medicare Solutions                                                                                                                                                   | Upper Concourse                      |
| 3:00 to 3:50 PM           | <b>Retention Is More Than a 9-Letter Word: Building Client Loyalty Through Relationships, Education, and Service (1-HR CE / Course: 394168)</b><br>Paige Phillips, Managing Partner, Paige Phillips Agency, LLC | Ben H. Lewis Hall, Exhibit Hall A, B |
| <b>BREAKOUT SESSIONS:</b> |                                                                                                                                                                                                                 | Ben H. Lewis Hall, Exhibit Hall A, B |
| 4:00 to 4:50 PM           | <b>It's Not the Tools. It's the Training. Practical AI for Medicare Agents</b><br>Rebl Risty, AI-Powered Marketing Strategist & Founder, REBL Marketing                                                         |                                      |
| 4:00 to 4:50 PM           | <b>Medicare &amp; You (1-HR CE / Course: 393672)</b><br>David Garcia, Senior Medicare Sales Consultant, Warner Pacific Insurance Services                                                                       | Raincross Ballroom A, D              |
| 4:00 to 4:50 PM           | <b>90-Days to Cross-Selling Success</b><br>Shawn Roberts, Director of Marketing, TWH Financial & Insurance Solutions, Inc.                                                                                      | Raincross Ballroom B, E              |
| 5:00 PM                   | <b>Dinner on Your Own</b>                                                                                                                                                                                       |                                      |

## Wednesday, September 2, 2026 – Day 2

|                           |                                                                                                                                                                                                                                                                                                                                                                                                                      |                                      |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------|
| 7:00 AM to 12:00 PM       | <b>Registration</b>                                                                                                                                                                                                                                                                                                                                                                                                  | Upper Concourse                      |
| 7:30 to 9:30 AM           | <b>Breakfast Buffet</b><br>Breakfast Partner: Astrana Health                                                                                                                                                                                                                                                                                                                                                         | Upper Concourse                      |
| 8:00 AM to 12:00 PM       | <b>Exhibit Hall Open</b>                                                                                                                                                                                                                                                                                                                                                                                             | Ben H. Lewis Hall, Exhibit Hall C, D |
| 8:45 to 9:00 AM           | <b>Welcome and Orders of the Day</b><br>Maggie Stedt, CSA, LPRT; Yolanda Webb, CHRS; Ricky Haisha, LUTCF, Summit Co-Chairs                                                                                                                                                                                                                                                                                           | Ben H. Lewis Hall, Exhibit Hall A, B |
| 9:00 to 9:15 AM           | <b>Platinum Ribbon Partner – Alignment Health Plan</b><br>Dawn Maroney, President, Alignment Health, and CEO, Alignment Health Plan                                                                                                                                                                                                                                                                                  |                                      |
| 9:15 to 10:05 AM          | <b>Medicare Legislative Outlook and Challenges</b><br>Calvin Bagley, Speaker, Entrepreneur & Healthcare Industry Leader; Amanda Brewton, Founder, Medicare Now; Chalen Jackson, Key Accounts Specialist & Compliance Officer, Senior Marketing Specialists; Paige Phillips, Managing Partner, Paige Phillips Agency, LLC; and Nick Uehlecke, Senior Policy Advisor & Principal, Todd Strategy Group                  |                                      |
| 10:15 to 11:00 AM         | <b>The State of Medicare Today: Carrier and Agent Perspectives</b><br>Marcelo Castro, Insurance Broker; Gary A Culp II, Senior VP, Government Markets, Blue Shield of California; Michelle de Guzman, Michelle's Insurance Solutions; Elsa Haro Rapp, Regional Director for Southern California, SCAN Health Plan; Dawn Maroney, CEO, Alignment Health Plan; and Carlos Ramirez Jr., Insurance Agent, HRBC Insurance |                                      |
| 11:00 to 11:15 AM         | <b>Morning Coffee</b><br>Break Partner: L A Care Health Plan                                                                                                                                                                                                                                                                                                                                                         | Upper Concourse                      |
| 11:15 to 11:55 AM         | <b>PACE: The Biggest Opportunity in Senior Care Since MA</b><br>Brendan McLoughlin, President, e123; and Shadie Qaqish, VP of Enterprise Sales, InnoVage                                                                                                                                                                                                                                                             | Ben H. Lewis Hall, Exhibit Hall A, B |
| 12:00 to 1:15 PM          | <b>Lunch (Plated)</b><br>Lunch Partner: Jack Schroeder and Associates, Inc.                                                                                                                                                                                                                                                                                                                                          |                                      |
| 1:00 to 5:00 PM           | <b>Exhibit Hall Open</b>                                                                                                                                                                                                                                                                                                                                                                                             | Ben H. Lewis Hall, Exhibit Hall C, D |
| 1:20 to 2:00 PM           | <b>Heard on the Street</b><br>Amanda Brewton, Founder, Medicare Now; and Nick Uehlecke, Senior Policy Advisor & Principal, Todd Strategy Group                                                                                                                                                                                                                                                                       | Ben H. Lewis Hall, Exhibit Hall A, B |
| 2:00 to 2:50 PM           | <b>Keynote Presentation: Team Building, Planning, and Making Opportunities for Succeeding by Attitude and Teamwork</b><br>Vince Ferragamo, NFL Quarterback, Entrepreneur, and Motivational Speaker                                                                                                                                                                                                                   |                                      |
| 3:00 to 3:30 PM           | <b>Snack Break</b><br>Break Partner: NCD                                                                                                                                                                                                                                                                                                                                                                             | Upper Concourse                      |
| <b>BREAKOUT SESSIONS:</b> |                                                                                                                                                                                                                                                                                                                                                                                                                      |                                      |
| 4:00 to 4:50 PM           | <b>E &amp; O Understandings</b><br>CALSurance Associates Attorney and Chalen Jackson, Key Accounts Specialist & Compliance Officer, Senior Marketing Specialists                                                                                                                                                                                                                                                     | Ben H. Lewis Hall, Exhibit Hall A, B |
| 4:00 to 4:50 PM           | <b>Hackers Love Insurance Agents. Here's How to Ruin Their Day (Simple Steps to Protect Your Business, Clients, and Data)</b><br>Jameson Keller, Chief Commercial Officer, NCD Dental                                                                                                                                                                                                                                | Raincross Ballroom A, D              |
| 4:00 to 4:50 PM           | <b>Before You Buy: A Practical Guide to Vetting Insurance Technology Vendors</b><br>Amber Petkosek, Field Marketing Lead, AgencyBloc                                                                                                                                                                                                                                                                                 | Raincross Ballroom B, E              |
| 4:00 to 4:50 PM           | <b>Understanding Medicare for the Group Health Insurance Broker (1-HR CE / Course: 210663)</b><br>Henry Romero, Founder, HRBC Insurance                                                                                                                                                                                                                                                                              | Raincross Ballroom C, F              |
| 6:00 PM                   | <b>Senior Summit Happy Hour (Cash Bar, Light Snacks)</b>                                                                                                                                                                                                                                                                                                                                                             | Outdoor Plaza                        |

## Thursday, September 3, 2026 – Day3

|                     |                                                                                                                                                 |                                             |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|
| 7:30 AM to 12:00 PM | <b>Exhibit Hall Open</b>                                                                                                                        | <i>Ben E. Lewis Hall, Exhibit Hall C, D</i> |
| 8:00 to 10:00 AM    | <b>Registration</b>                                                                                                                             | <i>Upper Concourse</i>                      |
| 8:00 to 10:00 AM    | <b>Morning Breakfast Buffet</b><br>Breakfast Partner: SCAN Health Plan                                                                          | <i>Upper Concourse</i>                      |
| 8:50 to 9:00 AM     | <b>Welcome and Orders of the Day</b><br>Maggie Stedt, CSA, LPRT; Yolanda Webb, CHRS; Ricky Haisha, LUTCF, Summit Co-Chairs                      | <i>Ben E. Lewis Hall, Exhibit Hall A, B</i> |
| 9:00 to 9:50 AM     | <b>2027 First Look and Product Overview</b><br>Blue Shield of California                                                                        | <i>Ben E. Lewis Hall, Exhibit Hall A, B</i> |
| 9:55 to 10:35 AM    | <b>2027 First Look and Product Overview</b><br>SCAN Health Plan                                                                                 | <i>Ben E. Lewis Hall, Exhibit Hall A, B</i> |
| 10:40 to 11:10 AM   | <b>2027 First Look and Product Overview</b><br>Anthem Blue Cross                                                                                | <i>Ben E. Lewis Hall, Exhibit Hall A, B</i> |
| 11:00 to 11:30 AM   | <b>Morning Coffee</b><br>Coffee Partner: Champion Health Plan                                                                                   | <i>Upper Concourse</i>                      |
| 11:20 to 11:50 AM   | <b>2027 First Look and Product Overview</b><br>Champion Health Plan                                                                             | <i>Ben E. Lewis Hall, Exhibit Hall A, B</i> |
| 12:00 PM            | <b>Exhibit Hall Closed</b>                                                                                                                      | <i>Ben E. Lewis Hall, Exhibit Hall C, D</i> |
| 12:00 to 12:30 PM   | <b>Grab &amp; Go Lunch</b>                                                                                                                      | <i>Upper Concourse</i>                      |
| 12:35 to 1:05 PM    | <b>2027 First Look and Product Overview</b><br>Aetna Medicare Solutions                                                                         | <i>Ben E. Lewis Hall, Exhibit Hall A, B</i> |
| 1:10 to 1:40 PM     | <b>2027 First Look and Product Overview</b><br>Clever Care                                                                                      | <i>Ben E. Lewis Hall, Exhibit Hall A, B</i> |
| 1:45 to 2:15 PM     | <b>2027 First Look and Product Overview</b><br>Humana                                                                                           | <i>Ben E. Lewis Hall, Exhibit Hall A, B</i> |
| 2:15 to 2:30 PM     | <b>Snack Break</b><br>Break Partner: Omnicare Medical Group                                                                                     | <i>Upper Concourse</i>                      |
| 2:30 to 3:00 PM     | <b>2027 First Look and Product Overview</b><br>Elite Health Plan                                                                                | <i>Ben E. Lewis Hall, Exhibit Hall A, B</i> |
| 3:05 to 3:35 PM     | <b>2027 First Look and Product Overview</b><br>UnitedHealthcare                                                                                 | <i>Ben E. Lewis Hall, Exhibit Hall A, B</i> |
| 3:35 to 4:00 PM     | <b>Closing Statements, Membership Results, Awards &amp; Grand Prize Raffle Announcement</b><br><b>Grand Prize Partner Presentation: AltaMed</b> |                                             |
| 4:00 PM             | <b>The End – Thank You for Attending the Senior Summit – See You in 2027!</b>                                                                   |                                             |