Financial Research Associates Proudly Presents Our

Medicare Advantage Summit
Medicare Savings Accounts, Medicare Risk Adjustment, SNPs, PFFS, Part D, and more!

3-Day Summit Features:

2 Pre-Conference Workshops:
• Medicare Medical Savings Accounts: A Soup to Nuts Examination of the New Plan
• An In-Depth Guide to Medicare Risk-Adjustment Audits

5 Keynote Sessions:
• Opening Keynote Address by Industry Guru John Gorman: The View from Washington on Medicare Advantage
• Long-Term Care: Medicare Prescription Drug Coverage in Institutions and Our Communities
• Private Fee for Service: Where is the ROI?
• Pay for Performance & Disease Management
• The Business of Operating a Chronic Care SNP

4 In-Depth Tracks:
• Medicare Part D
  • 5 Sessions including “Changes Under the New Democratic Congress”
  • Medicare Advantage 101
  • 5 Sessions including “Overcoming MA Plan Implementation Issues”
• Special Needs Plans
  • 5 Sessions including “Chronic Care SNPs – Levers of Feasibility”
• Medicare Advantage Operations
  • 5 Sessions including “Medicare by the Numbers: The Business Side of Running MA Programs”

Platinum Sponsor: Gold Sponsors:

Silver Sponsor:

To Register:
Call 800-280-8440 or visit us at www.frallc.com

May 7-9
2007
Hilton Alexandria Mark Center
Alexandria, Virginia
Sweeping change is affecting Medicare Advantage Plans. Are you prepared? How will you identify your market? How will you manage with tighter resources?

We can help. Join us in Virginia this May for Financial Research Associates’ Medicare Advance Summit. FRA is emerging as a leader in Medicare-related conferences with our annual events focused on Special Needs Programs, Dual Eligibles, Medicare Risk Adjustment, etc.

Now, we are very pleased to announce we are combining all of these successful events under one umbrella for our largest ever Medicare summit. This event is 3 days, featuring:

- Two pre-conference workshops:
  - Medicare Medical Savings Accounts: A Soup to Nuts Examination of the New Plan
  - An In-Depth Guide to Medicare Risk-Adjustment Audits
- Four keynote addresses, including:
  - Industry Guru John Gorman
- Four fully comprehensive break out tracks on:
  - Medicare Part D
  - Medicare Advantage 101
  - Special Needs Programs
  - Medicare Advantage Operations

Don’t miss this opportunity to mingle and learn from the largest gathering of Medicare Advantage experts! Register today!

Call 800-280-8440 or register online at www.frallc.com.

Sincerely,

April Johnson Stearns

April Johnson Stearns, Conference Director

FINANCIAL RESEARCH ASSOCIATES, LLC

PS. This event promises to sell out – register early to save your spot!

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Hilton Alexandria Mark Center – Alexandria, Virginia

Located in the West End of Historic Alexandria, The Hilton Alexandria Mark Center Hotel offers elegance and attentive service combined with value. This Hilton Hotel is within sight of the nation’s capitol and just ten minutes from the central business district of Washington, DC. Hotel guests are also near to the quaint waterfront galleries and shops in Old Town Alexandria, VA.

The Hilton Alexandria Mark Center’s unique lakeside setting — adjacent to a 43-acre botanical preserve — provides a tranquil oasis for travelers to Washington. The hotel has a towering glass atrium and Italian marble clad lobby.
Our Renowned Speaking Faculty

Jean D. LeMasurier, Director, Employer Group Practice, GORMAN HEALTH GROUP
David Bach, LEPRECHAUN
John E. Sattenspiel, MD, Sr. Medical Director, APROPO BENEFITS MANAGEMENT
Diane Flanders, MASSACHUSETTS SENIOR CARE OPTIONS PROGRAMS
Stephanie Vaughn-Martin, CMS
John Gorman, President & Chief Executive Officer, GORMAN HEALTH GROUP
Stephen Wood, Principal, REDEN & ANDERS, LTD.
Rick Bowles, Sr. Consultant, GORMAN HEALTH GROUP, LLC.
Joel Hoffman, Principal, REDEN & ANDERS, LTD.
Stephen Jackson, Managing Director, PLAN DATA MANAGEMENT, INC.
Holly Michaels Fisher, Senior Consultant, REDEN & ANDERS, LTD.
William Sullivan, SPECIALTY PHARMACY SOLUTIONS
Robert J. Hill, Partner, REED SMITH LLP
Lindsey Resnick, FINELIGHT
Jill Spenser, HUMANARC
John P. DuMoulin, MS, CAE, Vice President, Government Relations and Product Development, URAC
Jack Rohfritch, President, QMED INC.
Susan L. Cimbalo, President, HEALTH RISK PARTNERS, INC.
Timothy P. Trysla, Counsel, Health Care Group, ALSTON & BIRD LLP
Jody A. Miller, Operations Manager, CIGNA HEALTHCARE
Drew G. Narayan, Director, Individual Segment Marketing, BLUE CROSS BLUE SHIELD OF NORTH CAROLINA
Christopher D. Palmieri, Executive Director, Medicare Advantage, VISITING NURSE SERVICE OF NEW YORK
Ronald P. Bangasser, MD, FAAFP, Chairperson P4P Technical Committee, INTEGRATED HEALTHCARE ASSOCIATION
Gary Jacobs, Sr. Vice President, Corporate Development, UNIVERSAL AMERICAN FINANCIAL CORPORATION
Robb Cohen, Vice President, Government Affairs, XLHEALTH/CARE IMPROVEMENT PLUS

Agenda at a Glance

MONDAY, May 7, 2007

9:30 – 12:30 Pre-Conference Workshop A: Medicare Medical Savings Accounts: A Soup to Nuts Examination of the New Plan
12:30 – 1:30 Lunch
1:30 – 4:30 Pre-Conference Workshop B: An In-Depth Guide to Medicare Risk-Adjustment Audits
4:30 – 6:00 Wine & Cheese Reception & Early Conference Registration

TUESDAY, May 8, 2007

8:45 – 8:55 Chairs’ Welcome
8:55 – 9:30 Medicare Advantage Summit Opening Keynote Address: The View from Washington on Medicare Advantage
9:30 – 10:00 Keynote Session: Long-Term Care: Medicare Prescription Drug Coverage in Institutions and Our Communities
10:00 – 10:30 Case Study: Provider-Based Launch of Medicare Advantage Dual-Eligible Special Needs Plan
10:30 – 11:00 Keynote Session: The Business of Operating a Chronic Care SNP
11:00 – 11:15 Refreshment and Networking Break sponsored by HEALTHRISK
11:15 – 11:45 Keynote Session: Private Fee for Service: Where is the ROI?
11:45 – 12:15 Keynote Session: Pay for Performance & Disease Management
12:15 – 1:15 Luncheon sponsored by

TRACK A: MEDICARE PART D

1:15 – 2:00 Changes Under the New Democratic Congress
2:00 – 2:45 Maximizing Medication Therapy Management Program Value
2:45 – 3:15 Refreshment and networking break sponsored by medco
3:15 – 4:00 Implementing Part D into Your Special Needs Plan: Segmenting Your Dual Eligibles into a SNP
4:00 – 4:35 Topic to be Determined
4:35 – 5:05 Part D Audits & Reconciliations
5:05 Gala Reception

TRACK B: MEDICARE ADVANTAGE 101

1:15 – 2:00 An Option Analysis of Medicare Advantage Plan Programs
2:00 – 2:45 Successful Medicare Marketing: Combining Brand, Direct Response and Grassroots Marketing
2:45 – 3:15 Refreshment and networking break sponsored by medco
3:15 – 4:00 Overcoming MA Plan Implementation Issues
4:00 – 4:35 Part D Financial Reconciliation: How to Manage Risk Sharing Under CMS’s First-Ever Bid Cycle
4:35 – 5:05 Deeming Part D & Implications for Part D

WEDNESDAY, May 9, 2007

TRACK A: SPECIAL NEEDS PLANS

8:05 – 8:15 Chair’s Day Two Welcome
8:15 – 9:00 Your SNP: Defining, Marketing & Retaining Members
9:00 – 9:45 Chronic Care SNPs in Two Parts
9:45 – 10:15 Refreshment break and hotel checkout
10:15 – 11:00 Medicaid and Medicare Integration for SNPs: Opportunities and Risks
11:00 – 11:45 Plan Services to Address the Holistic Needs of SNP Dual Membership
11:45 Conference Adjourns

TRACK B: MEDICARE ADVANTAGE OPERATIONS

8:05 – 8:15 Chair’s Day Two Welcome
8:15 – 9:00 Medicare by the Numbers: The Business Side of Running Medicare Advantage Programs
9:00 – 9:45 Driving Enrollment by Coordinating Marketing and Call Center Strategies
9:45 – 10:15 Refreshment break and hotel checkout
10:15 – 11:00 Financial Reporting Issues — Four Complexities That All PDPs Must Conquer
11:00 – 11:45 SNP Session: The Future of SNPs: The View from CMS
11:45 Conference Adjourns
Day 1: MONDAY, May 7, 2007

8:45 – 9:30
Registration and Continental Breakfast

Pre-Conference Workshop A

9:30 – 12:30
Medicare Medical Savings Accounts: A Soup to Nuts Examination of the New Plan
This in-depth workshop provides insight into Medicare Medical Savings Accounts and their impact on the future of Medicare plans.
• How does an MSA work with existing savings accounts?
• What is the operational level of implementing these types of programs?
• Opportunities & challenges
• Arguments of critics to Medicare Savings Accounts

Workshop Leader:
Jean D. LeMasurier, Director, Employer Group Practice
GORMAN HEALTH GROUP

Session will include a break from 10:30 – 10:45

12:30 – 1:30
Luncheon for workshop attendees & speakers

Pre-Conference Workshop B

1:30 – 4:30
An In-Depth Guide to Medicare Risk-Adjustment Audits
This in-depth workshop provides information on successful risk-adjustment payment system audits, including:
• Implications of the risk-adjusted payment system on plans
• Mastering the ins & outs of the payment system
• Advanced uses of predictive modeling
• How effective disease management works to address risk-adjustment optimization for MA plans
• CMS program strategies
• Risk-adjustment management in non-network plans
• Using risk-adjusted data to assess Special Needs Plans product offerings
• Planning for and conducting an audit

Workshop Leaders:
Stephen Wood, Principal
REDEN & ANDERS, LTD.
David Bach, LEPRECHAUN
Susan L. Cimbalo, President
HEALTH RISK PARTNERS, INC.

Session will include a break from 2:30 – 2:45

Day 2: TUESDAY, May 8, 2007

8:00 – 8:45
Registration and Continental Breakfast

8:45 – 8:55
Chairs’ Welcome
Stephen Wood, Principal, REDEN & ANDERS, LTD.

Summit Opening Keynote Address

8:55 – 9:30
The View from Washington on Medicare Advantage
• The financial picture for MA and implications of the Democratic Congressional takeover
• The enrollment picture and what it means
• The competitive landscape and how it is changing
• Outlook for Private Fee-for-Service and MSAs
• Outlook for Special Needs Plans
• PDPs and Medigap: At the high-water mark?
• Strategic considerations for 2008 and beyond

Keynote Presenter:
John Gorman
President & Chief Executive Officer
GORMAN HEALTH GROUP

Four Plenary Spotlight Sessions

9:30 – 10:00
KEYNOTE SESSION
Long-Term Care: Medicare Prescription Drug Coverage in Institutions and Our Communities
Millions of Medicare beneficiaries are residents of long-term care institutions or receive institutional level care in the community.
• How will Medicare Prescription Drug Coverage work for these individuals?
• What changes can we expect to see in long-term care pharmacies?
• Medicare reform & the geriatric patient: How does disease management differ from geriatric care?

Speaker:
Larry Kocot, Senior Advisor to the Administrator, Office of the Administration
CENTERS FOR MEDICARE & MEDICAID SERVICES
[pending final approval]

10:00 – 10:30
KEYNOTE SESSION
Case Study: Provider-Based Launch of Medicare Advantage Dual-Eligible Special Needs Plan
• Effective Plans & Execution Ideas to assure success of new product launch
• Plan Design

Important Information

To Register:
Fax: 704-889-1292
Mail: Financial Research Associates
18705 NE Cedar Drive
Battle Ground, WA 98604
Phone: 800-280-8440
Online: www.frallc.com

Medicare Advantage Summit
May 7-9, 2007
Hilton Alexandria Mark Center
5000 Seminary Rd,
Alexandria, VA 22311
(703) 845-1010

Note: Should you require overnight accommodations, please contact the hotel at least 30 days prior to the conference date. Advise them that you are attending the FRA “Medicare Advantage Summit” to receive the negotiated conference discount rate. Within 30 days of the conference, prevailing hotel rates may be quoted, as the conference rate is no longer guaranteed. Book early—the hotel will sell-out!

Fees and Payments:
The fee for attendance at Medicare Advantage Summit is:
• Conference and 2 pre-conference workshops, Medicare Medical Savings Accounts and An In-Depth Guide to Medicare Risk-Adjustment Audits: $2295
• Conference and 1 pre-conference workshop, Medicare Medical Savings Accounts or An In-Depth Guide to Medicare Risk-Adjustment Audits: $1995
• Conference only: $1695
• Special rate: Government and academic: $995. Workshops are an additional $195 each.
The Business of Operating a Chronic Care SNP: A Case Study of Multiple Chronic Care SNPs

Getting started and having your SNP approved by CMS:
- Adding a new revenue stream to your existing organizational structure
- Going Live:
  - Enrolling a membership base
  - Managing the Chronically Ill
  - Managing RAPS
- Achieving Profitability:
  - Being financially successful in year one

Speaker:
Jack Rohfritch, President, QMED INC.

Private Fee for Service: Where is the ROI?
- Actuarial facts & figures
- Risks & rewards
- Determining your return on investment

Speaker:
John E. Sattenspiel, MD, Senior Medical Director
APPROPO BENEFITS MANAGEMENT

Pay for Performance (P4P) & Disease Management
As pay for performance gains momentum in managed care & consumer-driven environments, health plans and providers alike are working to ensure that their incentive contracts are designed to effectively deliver quality care. This session's topics include:
- Effective outcomes-based incentives
- Garnering buy-in
- Designing & implementing disease management programs
- How physicians and health plans can work with CMS
- Medicare reform and the geriatric patient: How does disease management differ from geriatric care?

Speaker:
Ronald P. Bangasser, MD, FAFP, Chairperson P4P Technical Committee
INTEGRATED HEALTHCARE ASSOCIATION
Director of External Affairs, BEAVER MEDICAL GROUP
Past President, CALIFORNIA MEDICAL ASSOCIATION
### Day 2: TUESDAY, May 8, 2007 (continued)

**TRACK A: MEDICARE PART D**

1:15 – 2:00  
**Changes Under the New Democratic Congress**  
To register: 800-280-8440 or www.frallc.com

<table>
<thead>
<tr>
<th>Time</th>
<th>Speaker</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:15 – 2:00</td>
<td>Robert J. Hill, Partner REED SMITH LLP</td>
<td>Introduction of a new Part D plan administered directly by CMS / Filling in the coverage gap / Imposition of new mandates on Part D plans / Regulatory response by CMS / The increased privatization of Medicare</td>
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### Track A: Medicare Part D

1:15 – 2:00  
**An Option Analysis of Medicare Advantage Plan Programs**  
**Speaker:** Gary Jacobs, Sr. Vice President, Corporate Development  
**Company:** UNIVERSAL AMERICAN FINANCIAL CORPORATION

2:00 – 2:45  
**Successful Medicare Marketing: Combining Brand, Direct Response and Grassroots Marketing**

The Medicare landscape has changed forever! Customer acquisition and retention efforts must be retooled as competitive rivalry reaches an all-time high. This informative session will take a look at successful tactics for marketing Medicare and how they can be leveraged in the future. Three keys for success will be discussed that all health care marketers should be focused on going forward:

- Branding and why it’s a bottom line issue in the Medicare segment
- Brand response strategies that drive top line growth
- Creating the optimal customer brand experience

Success will come from connecting with your senior customers. For new member acquisition and customer retention this means understanding what’s important to them, what concerns them, and how they want to feel about their Medicare plan.

**Speaker:**  
**Lindsey Resnick**  
**Company:** FINELIGHT

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**TRACK B: MEDICARE ADVANTAGE 101**

1:15 – 2:00  
**An Option Analysis of Medicare Advantage Plan Programs**

- Define market segments
- Enrollment and revenue statistics and projections
- Explore marketing challenges
- Identify regulatory concerns

**Speaker:**  
**Gary Jacobs, Sr. Vice President, Corporate Development**  
**Company:** UNIVERSAL AMERICAN FINANCIAL CORPORATION

2:00 – 2:45  
**Your SNP: Defining, Marketing & Retaining Members**

**Speaker:**  
**Rick Bowles,**  
**Product Leader, SNP Medicare Products, GORMAN HEALTH GROUP, LLC**

### Track B: Medicare Advantage Operations

8:05 – 8:15  
**Chair’s Day Two Welcome**  
**Chairperson:**  
**Stephen Jackson,**  
**Managing Director,**  
**PLAN DATA MANAGEMENT, INC.**

8:15 – 9:00  
**Your SNP: Defining, Marketing & Retaining Members**

**Speaker:**  
**Rick Bowles,**  
**Product Leader, SNP Medicare Products, GORMAN HEALTH GROUP, LLC**

9:00 – 9:45  
**Chronic Care SNPs in Two Parts ~ Part 1: Levers of Feasibility**

- Enrollment sources
- Enrollee cost patterns
- CMS payment patterns for enrollees
- Care management savings expectations
- Other considerations

**Part 2: Product Design**

- Product design considerations
- Experience as an RPPO Chronic SNP
- What makes chronic SNPs special

**Speaker:**  
**Lindsey Resnick**  
**FINELIGHT**

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### Day 3: WEDNESDAY, May 9, 2007

**Continental breakfast**

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2:45 – 3:15
Refreshment and networking break sponsored by Medco

3:15 – 4:00
Implementing Part D into Your Special Needs Plan: Segmenting Your Dual Eligibles into a SNP
• Developing a strategy for working with state Medicaid agencies/Medicaid health plans
• Product development & marketing
• Education: Helping members understand the plan
• Operations challenges
Speaker:
Rick Bowles, Product Leader, SNP Medicare Products, GORMAN HEALTH GROUP, LLC

4:00 – 4:35
Topic to be Determined
Speaker:
Andrew Davis, Vice President, Senior Market Development MEDCO

4:35 – 5:05
Prescription Drug Event (PDE) Reconciliation: Error Resolution and Tracking
Many PDPs and MAPDs have had a difficult first year in the submission of PDE Data. Learn the best practices for PDE submission, error resolution and database development to avoid inappropriate reconciliation with CMS.
Speaker:
Glenn Ellerbe, Executive Vice President GORMAN HEALTH GROUP, LLC

5:05 – 5:45
GALA RECEPTION SPONSORED BY QMED
Medicare Advantage Summit

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□ Conference and 1 Pre-Conference Workshop (Medicare Medical Savings Accounts or An In-Depth Guide to Medicare Risk-Adjustment Audits) ….$1995
□ Conference and 2 Pre-Conference Workshops (Medicare Medical Savings Accounts and An In-Depth Guide to Medicare Risk-Adjustment Audits) ….$2295
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