

JANUARY 2025

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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 2025

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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 2025

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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 2025

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APRIL



National Volunteer Month



HIGHLIGHT OF THE MONTH:

Cross-selling

 **REMINDERS:**

- Community involvement makes an effective marketing strategy

 **IMPORTANT DATES:**

 **GOALS:**

- Volunteer in your local community for a few hours

- Follow up with five clients and look for coverage gaps

 **NOTES:**

MAY 2025

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MAY

 **HIGHLIGHT OF THE MONTH:**

Dental, vision, and hearing insurance

 **REMINDERS:**

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

- Ritter’s Summits registration opens!

- 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 2025

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JUNE



National Annuity Awareness Month



HIGHLIGHT OF THE MONTH:

Fixed annuities



REMINDERS:

• Register for Ritter Summits



IMPORTANT DATES:



GOALS:

• Pass AHIP or NABIP training



NOTES:

JULY 2025

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JULY

 **HIGHLIGHT OF THE MONTH:**

Hospital indemnity insurance

 **REMINDERS:**

• Carriers' First Looks & product certifications become available	
• Register for Ritter Summits	

 **IMPORTANT DATES:**

 **GOALS:**

• Get a free portfolio review from your Ritter sales specialist	

 **NOTES:** _____

AUGUST 2025

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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 2025

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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 2025

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OCTOBER



Breast Cancer Awareness Month



National Critical Illness Awareness Month



HIGHLIGHT OF THE MONTH:

Cancer and critical illness insurance

REMINDERS:

- Review all contracting statuses to ensure you're active and ready-to-sell with all products for AEP

IMPORTANT DATES:

- October 1 – May begin discussing upcoming plans with clients
- October 15 – AEP starts

GOALS:

- Sell at least five Medicare plans within the first two weeks of AEP

NOTES: _____

NOVEMBER 2025

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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 2025

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DECEMBER

 **HIGHLIGHT OF THE MONTH:**

Year-end review

 **REMINDERS:**


<ul style="list-style-type: none"> • Follow up with your AEP clients a few weeks after AEP ends 	
<ul style="list-style-type: none"> • First-eligible MA clients have a trial right 	

 **IMPORTANT DATES:**

<ul style="list-style-type: none"> • December 7 – AEP ends 	

 **GOALS:**

<ul style="list-style-type: none"> • Develop your follow-up strategy for the new year 	

 **NOTES:** _____

