

Educational Event - Do's and Don'ts

Do's	Don'ts
Hand out objective and generic educational materials on MA, Part D, and other Medicare programs	Display a sign-in sheet or collect contact info (e.g., names, addresses, phone numbers) of attendees – this doesn't constitute as permission to contact
Answer questions posed by attendees	Hand out applications or marketing materials which contain specific plan info (e.g., premiums, copayments, etc.)
Provide generic business reply cards to attendees	Answer questions beyond what attendees ask
Give out your business card and contact info for beneficiaries to use to initiate contact	Give away cash or other monetary rebates
	Provide or collect SOAs and/or enrollment forms
	Discuss any carrier-specific plan or benefits or distribute marketing plan materials
	Give an educational presentation in a one-on-one situation
	Schedule future appointments
	Hold a marketing/sales event within 12 hours of the educational event in the same building or any adjacent buildings
	Lead or attempt to lead attendees

toward a specific plan or set of plans