



# **SMARTCONNECT**

***SIMPLIFYING MEDICARE***



# Our Mission

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To empower organizations and individuals to confidently navigate the complexities of Medicare through personalized support, education, and meaningful connections.



# About Us

## What Do We Offer?

Medicare education & guidance via on-demand digital resources & consultations

Evaluate Medicare as a lower-cost alternative to group coverage

Enrollment services for individuals choosing to transition to Medicare

## Who Do We Serve?

Medicare-eligible employees who are still working

Employees looking to retire

Employees eligible for Medicare due to disability

Family members of Employees

## Coverage Options

Medicare Supplement

Medicare Advantage

Prescription Drug Plans

Affordable Care Act (ACA) Plans

Short-Term Medical Insurance

Dental, Vision, & Hearing Insurance

*SmartConnect empowers organizations to confidently navigate the complexities of Medicare.*

# The SmartConnect Experience

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**Connect:** Help guide you and your family through the world of Medicare.



**Educate:** Ensure that you understand the details that impact enrollment, costs, and coverage.



**Evaluate:** Help you comparison shop across more than 20 leading carriers, to find the right plan for your needs.



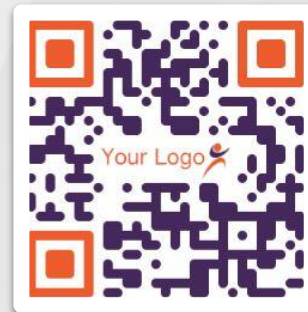
**Enroll:** Our services are obligation-free, but if you decide to take action, we can enroll you on the spot.



**Support:** We have a dedicated team available to answer your questions, conduct policy reviews, and even help work with the carrier.

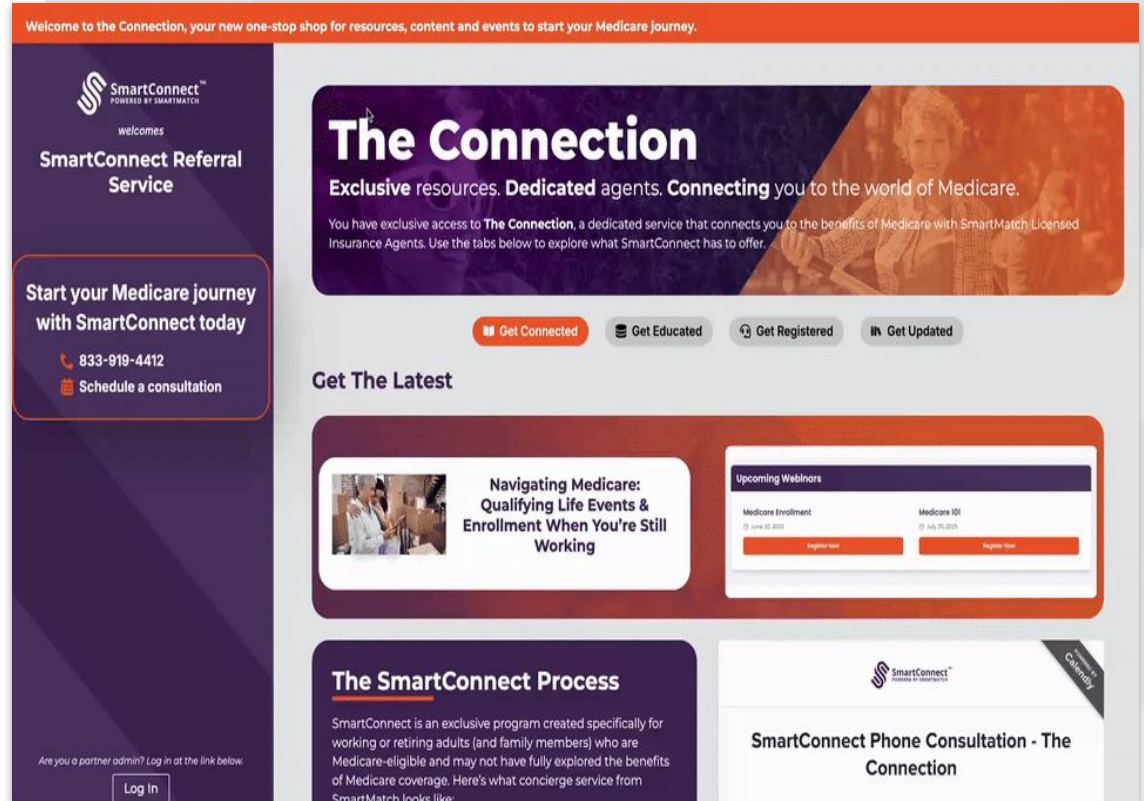
# HR & Employee Resources

- Co-branded Resources\*
- Unique SmartConnect Phone Number\*
- Medicare 101 Webinars
- Benefit Fair Presentations
- Webinars for HR Members and Benefits Professionals




# The Connection

- Access to Educational Resources & Blogs
- Register for Live Webinars
- Access Pre-Recorded Webinar
- Upload Census Data (Active+ only)



Welcome to the Connection, your new one-stop shop for resources, content and events to start your Medicare journey.

 **SmartConnect**<sup>™</sup>  
POWERED BY SMARTMATCH

welcomes

**SmartConnect Referral Service**

Start your Medicare journey with SmartConnect today

833-919-4412

Schedule a consultation

Are you a partner admin? Log in at the link below.

[Log In](#)


## The Connection

Exclusive resources. Dedicated agents. Connecting you to the world of Medicare.

You have exclusive access to **The Connection**, a dedicated service that connects you to the benefits of Medicare with SmartMatch Licensed Insurance Agents. Use the tabs below to explore what SmartConnect has to offer.

[Get Connected](#) [Get Educated](#) [Get Registered](#) [Get Updated](#)

### Get The Latest


 **Navigating Medicare: Qualifying Life Events & Enrollment When You're Still Working**

**Upcoming Webinars**

Medicare Enrollment	Medicare 101
02 June 2025	02 July 2025
<a href="#">Register Now</a>	<a href="#">Register Now</a>

### The SmartConnect Process

SmartConnect is an exclusive program created specifically for working or retiring adults (and family members) who are Medicare-eligible and may not have fully explored the benefits of Medicare coverage. Here's what concierge service from SmartMatch looks like:

 **SmartConnect**<sup>™</sup>  
POWERED BY SMARTMATCH

**SmartConnect Phone Consultation - The Connection**

*Exclusive Concierge*

# Direct Marketing

## Increase employee engagement with Direct Marketing!

- Census Data Required, Uploaded via SmartConnect Website
- Monthly Educational Emails
- In-Home Mailers
- Welcome Emails & Mailers for Newly Eligible Individuals
- Option to participate in Appointment Setting



**Your Logo**

«Company Name» offers this free benefit for employees and their family members who may be Medicare-eligible.

**First Name:** ...at age 65 you become eligible for Medicare, which means you now have access to comprehensive coverage that can help you thrive.

**Company Name:** is dedicated to offering the best options for your health care needs. That's why you've partnered with **SmartConnect**, which offers expert guidance and support as you compare your current coverage to the benefits of Medicare plans.

**Your National Insurance agent will take as much time as you need to review your current plan, outline your choices, and answer your questions.** Once you find the perfect plan, your agent takes care of the enrollment process for you. This is a great time to look out for you, making you an beneficiary, so if there is never one plan that fits your needs.

**Don't delay. «First Name!»** You can explore your options at any time, regardless of «Company Name's» benefits enrollment period. The sooner you call, the more you could save.

Here's how SmartConnect works:

**Your agent exists.** Answer a few questions about your location, health care needs, lifestyle.

**Your agent recommends.** Compare your current plan against Medicare plans and plans from multiple carriers.

**You decide.** The choice is yours. Our agents help you understand and understand your options, making the switch, your agent will ensure for you.

See why SmartConnect is rated 4.9/5 stars by more than 6,000 TrustPilot reviewers!

I gave my agent an A+ because I was able to work with an agent who was knowledgeable, professional and was interested in my needs. I was pleased with this professional service.

Highly recommend Excellent customer service and explanations that the average person, like myself, can understand.

Now is the best time to start saving money!  
Call (800) XXX-XXXX today or visit [connect.smartmatch.com/XXXX](http://connect.smartmatch.com/XXXX)

How much can you save by switching to Medicare?  
Now is a great time to find out!

**Your Logo**

Now is eligible for plans that could save you hundreds per year.

Medicare - «Company Name»  
Medicare - «Company Name»  
Medicare - «Company Name»  
Medicare - «Company Name»

It's time to rethink your health care benefits.

Get free, no-obligation, expert help to make the right choice for you.

**SmartConnect** POWERED BY SMARTMATCH

Speak with a licensed agent:  
((Account.PartnerPhone)) | TTY: 711

“ SEE WHAT OUR CUSTOMERS ARE SAYING: My SmartConnect agent has been great to work with. Minnesota is not an easy state for Medigap insurance but he tailored a policy to fit my needs for \$40-\$60 a month cheaper than anyone else.”

Dear ((Account.FirstName)),

Your health and financial wellness are top priorities for ((Account.Employer)) and that's why they partnered with us: **SmartConnect**.

**SmartConnect** POWERED BY SMARTMATCH

Speak with a licensed agent:  
%PARTNER\_PHONE% | TTY: 711

Dear %FIRSTNAME%,

It's almost your birthday! And as you probably know, you'll be eligible for Medicare soon. What you may not know is that you can begin the Medicare enrollment process now, even if you already have coverage in place.

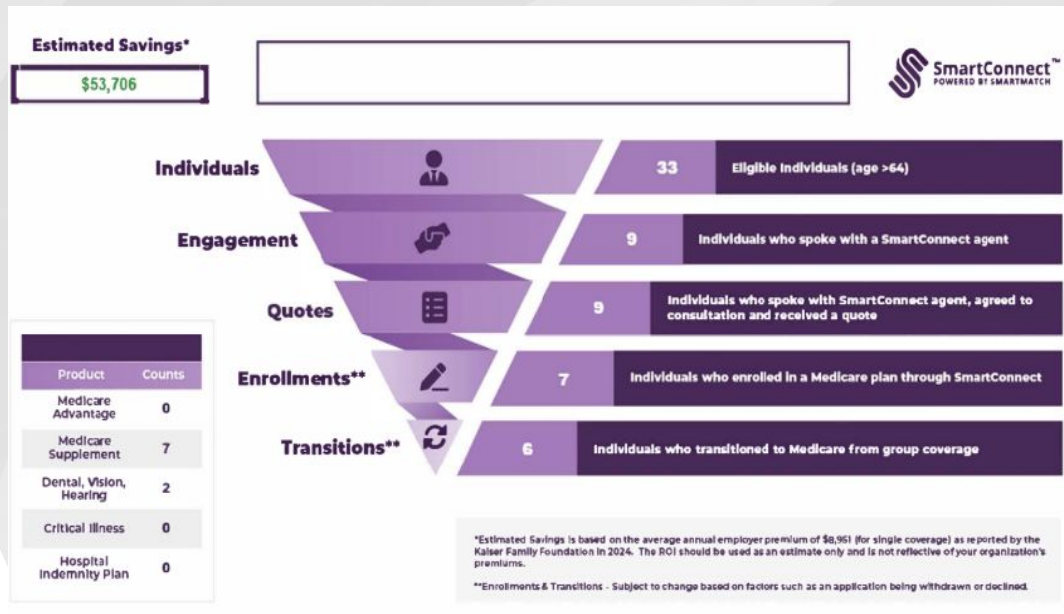
SmartConnect™ is a free service for %EMPLOYER% employees and family members who are Medicare-eligible. We bridge the gap between you and your Medicare options. So what does this mean for you?

- Your Initial Enrollment Period for Medicare has **already begun** – it starts 3 months before the month you turn 65!
- When you sign up during your initial Enrollment Period, some plans can't exclude you due to pre-existing conditions, and you'll avoid potential late enrollment penalties.
- You may find that Medicare coverage is cheaper than your current health plan.

# Partner Reporting

## Year-End Utilization Reporting Including:

- Engagement
- Quotes
- Enrollments
- Transitions
- Estimated Savings



# Return on Investment

**SmartConnect has saved organizations over \$40 million!**

With each employee who transitions to Medicare, your return on investment increases. On average, one transition results in a positive ROI.



Company Size:  
33,000

Transitions:  
26

Annual Employer  
Premium Savings:  
**\$192k**

Company Size:  
7,500

Transitions:  
19

Annual Employer  
Premium Savings:  
**\$166k**

Company Size:  
600

Transitions:  
7

Annual Employer  
Premium Savings:  
**\$74k**

*\*Savings are based on employer premium averages and do not account for claims*

# Implementation Steps

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1. Employer Group Submits Intake Form & Logo
2. Employer Group Executes Service Agreement
3. SmartConnect Creates Co-Branded Resources, Account Manager sends Welcome Email to Schedule Kickoff Call

***Implementation takes 2-4 weeks from receipt of the intake form & logo. Resources are not shared until Service Agreement has been executed.***



# Portfolio

- 2K+ Corporate Partners
- 2.2M+ employees
- 150k Medicare-eligible employees



BARNES & NOBLE



AIRBUS

adidas



# What People are Saying

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*“My experience with SmartConnect was outstanding. I was receiving so much mail regarding Medicare, I was confused & frustrated. The agent I spoke with was incredibly helpful and explained everything to me as we went through the process.”*

*“I absolutely adore the employees at SmartConnect, and the company as a whole. Medicare is so frightening to most people and there are so many ‘untruths’ out there that I find employees are thrilled that we have a company that I trust.”*

*“I love that I have a resource that our employees who are nearing retirement can turn to.”*

*“I am so pleased that our company gave us the option to use SmartConnect. I have already had other employees asking me about my experience.”*

*“Our agent was superb! We found her to be knowledgeable, patient and an absolute pleasure to work with. She is absolutely terrific.”*

*“Easy to work with and no extra work for my HR Department. SmartConnect does it all for you!”*



**SmartConnect**<sup>™</sup>  
MEDICARE BUSINESS SOLUTIONS

