SmartConnect™
MEDICARE BUSINESS SOLUTIONS
POWERED BY SMARTMATCH

SMARTCONNECT

SIMPLIFYING MEDICARE



Who We Are

Founded in 2009, Spring Venture Group ("SVG") is a leading national distributor for senior insurance products with headquarters in Kansas City, MO

- We are a premier distributor of Medicare Advantage and the #1 distributor for Medicare Supplement.
- Six years ago, we identified a critical need for Medicare expertise to support organizations - SmartConnect



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Our Mission

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



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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.

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The Rising Cost Of Healthcare

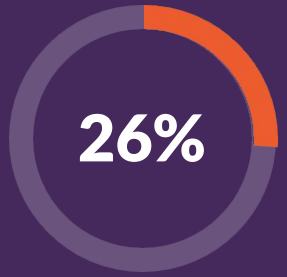
Pharmacy Spend: 25-30% of Total

Driven by rapid growth in GLP-1 and Specialty Drugs

Deductibles up 17% since 2020

Average single deductible reaching **$1,886** in 2025

Employer Premiums



+26% Cumulative growth since 2020

2024 & 2025: **6-7% rise**

2026 Forecast: **+10% increase**

The Rise of Large Claims: $100K+ claims increased 14% in 2025

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Sources: Kaiser Family Foundation (Oct 2025), Insurance & Risk Mgmt, Brown & Brown (Feb 2026)

The Aging Workforce

1 in 5 Americans

Nearly **19.5%** of those aged 65+ are currently in the labor force, actively working or seeking work.

Growth Context

In 1985, only **10.8%** worked; the participation rate has nearly doubled over the last four decades.

11-12 Million

Medicare-eligible individuals (65+) are currently balancing group health insurance with Medicare eligibility.

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Source: BLS & Pew Research Center Analysis (2026)

Why Medicare-Eligible Employees Stay On Your Plan

Extreme Confusion

The transition is complex, and no one is effectively educating them on the process.

Lack of Comparison

It's incredibly hard to compare individual Medicare options directly against group plans.

Limited Support

Most organizations lack the specific Medicare expertise required to guide their people.

The Result:

Employees stay on the group plan, paying more than they need to while driving up costs for everyone.

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We've Saved $100M+

in employer-paid premiums for our partners.

Every employee who transitions to Medicare saves an average of **$9,325** in premiums.

Our process works.

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Sources: Kaiser Family Foundation

The Process

Connect: Learn about your specific needs and requirements to be the best guide possible.

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

Evaluate: Help you comparison shop across more than 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.

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Resources For You & Your Employees

We're more than a vendor. We're your proactive strategic partner.

- Assigned Account Manager
- Digital Portal For Employees & HR
- Co-branded Educational Resources*
- Public & Private Webinars with Q&A
- Premium Savings Reporting
- Dedicated Phone Number*

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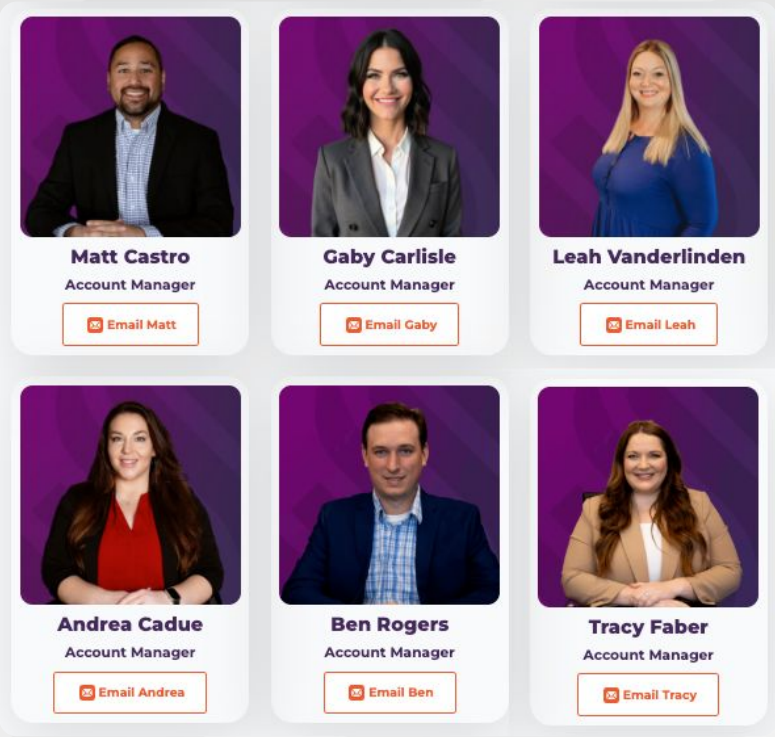
Dedicated Account Manager

Passive platforms don't get engagement. You need a person to help drive year-round strategy and support.

- Answers your questions about implementation and engagement
- Strategic planning year-round including key events like enrollment periods
- Sends new educational material for your employees
- Helps you internally promote upcoming webinars



Some of our incredible account managers

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The Connection

Employer-branded digital portal for you and your employees.

- Plan Recommendation Tool
- Schedule a Video Call
- Live Webinar Registration
- Downloadable Resources
- Replays of Past Webinars
- Upload Census Data (Active+ only)

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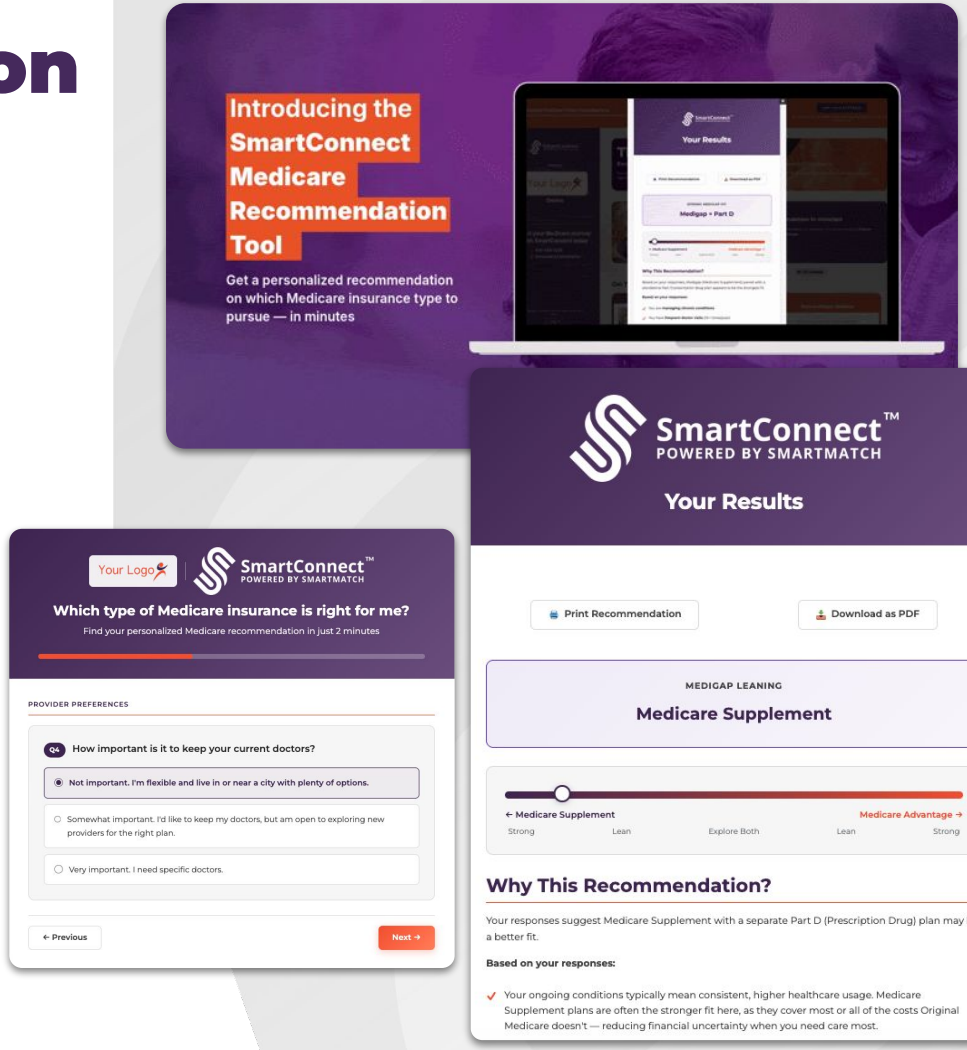
Plan Recommendation Tool

Using technology to provide unbiased recommendations.

- Focused on health and financial goals
- Helps your people compare coverage
- Easy to understand recommendations
- Employees feel more confident before talking to an agent



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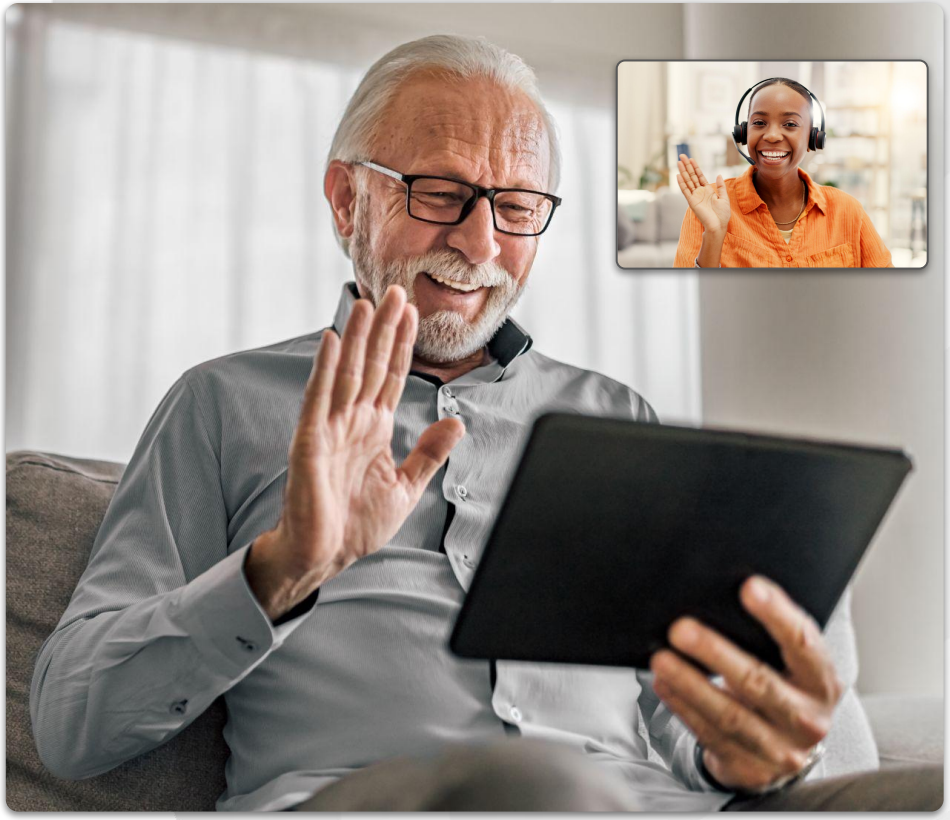
Video Consultations

Seeing your agent creates a personal connection.

- Vital when discussing sensitive healthcare decisions
- Visual cues make plans easier to understand
- Creates an authentic, pressure-free connection
- Employees feel personally guided and valued



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Public Webinars

Employees respond to no pressure educational events.

- Public & group-level webinars available
- Let employees learn at their own pace
- 100% live with real humans
- Licensed agents join our webinars to build trust
- Interactive with Q&A



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Group-Level Presentations

Group-level education gives employees a superior experience.

- Provided by your dedicated Account Manager
- Private webinars to Support Client and Member Needs
- Exclusive events for organizations (e.g., Medicare 101, HSA vs. Medicare, Retirement Transition)
- Benefit Presentations



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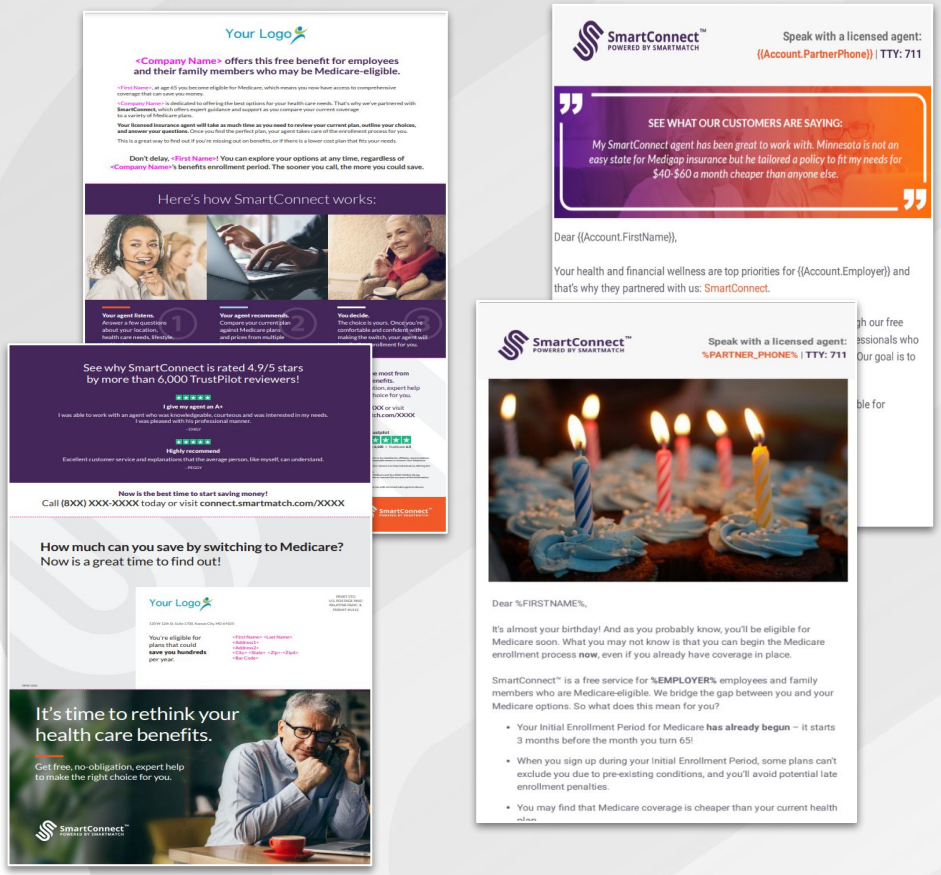
Co-Branded Direct Marketing

Employer-branded education increases trust and engagement.

- Direct and digital mail
- Welcome pieces for newly Medicare-eligible individuals
- Enrollment preparation
- Monthly educational emails



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Appointment Setting Program

Proactive outreach notifying employees of their benefit drastically increases utilization.

- Dedicated staff will call Medicare-eligible employees on your behalf only to schedule a future consultation with an agent.
- No more than 2 phone calls max (Open Enrollment and around age 64.5)
- Must Opt-In to participate, this service is completely voluntary and you can opt out at any time.



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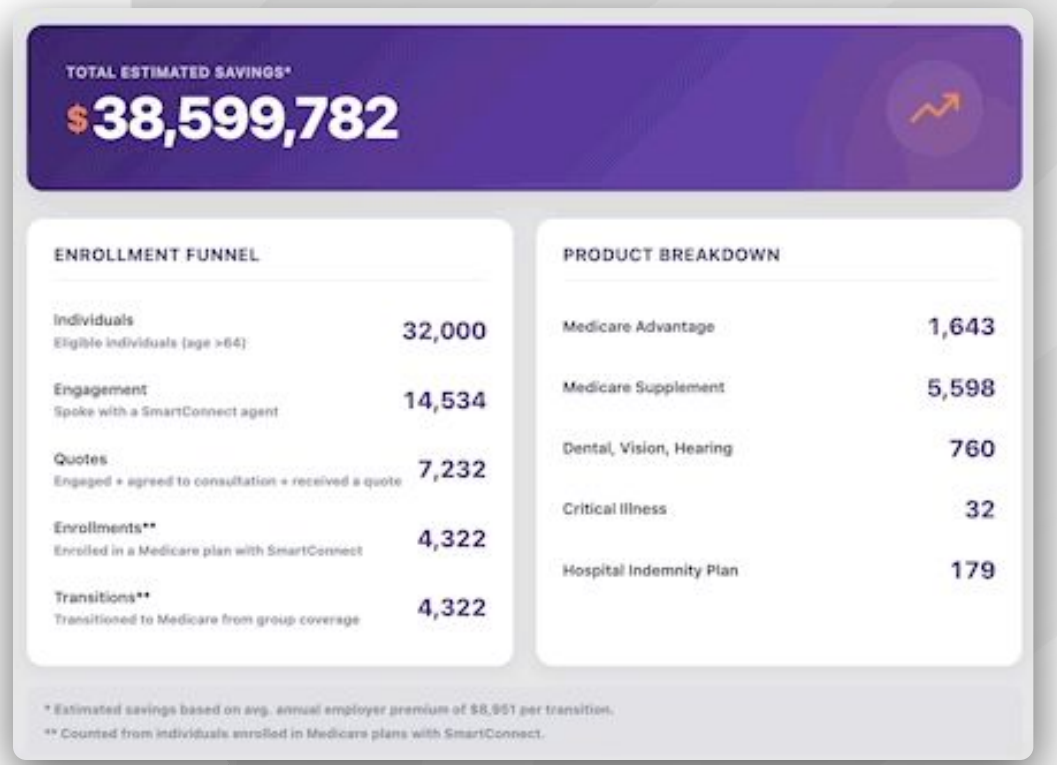
Group-Level Reporting

See engagement and premium savings any time

- Measure Cost-Containment
- Quantify the ROI
- Show Premiums Saved
- Available 24/7
- Faster Issue Resolution
- Better Collaboration



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Case Studies

SmartConnect has saved organizations hundreds of millions in premiums and claims!

Every employee who transitions to Medicare saves an average in **$9,325** in premiums. On average, one transition results in a positive ROI.



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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 Is Easy

1. Submit Your Intake Form & Logo
2. Sign Service Agreement
3. SmartConnect Creates Co-Branded Resources
4. Your Account Manager Schedules A Kickoff Call

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

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Why SmartConnect

Your Partner for Comprehensive Medicare Guidance

- **Proven Expertise & Stability**
  Over 4,000 partnerships, backed by a financially stable, mission-driven company.
- **Personalized, Unbiased Support**
  Licensed agents nationwide offering one-on-one education for advisors and clients.
- **Tangible Value & Savings**
  Enhance client value; clients can save thousands annually.
- **Seamless & Compliant**
  Integrated, branded solutions, fully licensed and CMS compliant.

SmartConnect will enrich the lives of your clients, and provide service beyond expectation.

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Portfolio

Organizations that trust us to serve their people

- 4K+ Corporate Partners
- 4M+ People With Access
- $100M+ Saved In Group Premiums Alone



























What People Are Saying

"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!"

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