



## Compliance Spotlight

### Educational & Marketing/Sales Events Guidance

AEP preparation is in full swing and it's all about meeting with Medicare beneficiaries. Whether you are conducting meetings in-person, over the phone, or virtually, you want to make sure you're following CMS and Carrier rules. We've put together a side-by-side comparison to walk you through CMS guidance for:

- Educational Events
- Formal & Informal Marketing/Sales Events
- One-on-One Marketing/Sales Appointments

Our [Educational & Marketing/Sales Events Guidance](#) outlines CMS guidelines and includes defining the type of event, requirements for event reporting and cancellation, advertising, gifts, collecting contact information and more. También disponible en español: [Orientación para Eventos Educativos y de Marketing/Ventas](#)

#### Reminders

- Marketing/sales events and appointments for 2022 sales can't be held prior to October 1. This includes all types of meetings: in-person, over the phone, and online.
- Any advertising for 2022 sales (i.e., flyers, postcards, letters) can't begin prior to October 1. This includes advertising events scheduled in early October.
- Enrollment applications for the 2022 Annual Enrollment Period (AEP) can't be accepted prior to October 15.

**Questions?** Reach out to your [Broker Sales Manager](#) for assistance planning your AEP strategy and getting Ready To Sell for 2022. You may also contact the [Compliance Team](#) with any compliance specific questions.

### CareFree Insurance Services, Inc.

**We're here for you!**

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