



MODERN TOOLS

FOR YOUR MODERN INSURANCE AGENCY

When you partner with CareValue, you are putting your trust in the hands of a company that wants you to succeed. We are a Field Marketing Organization (FMO) that was built by agents, for agents, and over the past 10 years we've developed the tools and resources agents and agencies need to be successful.

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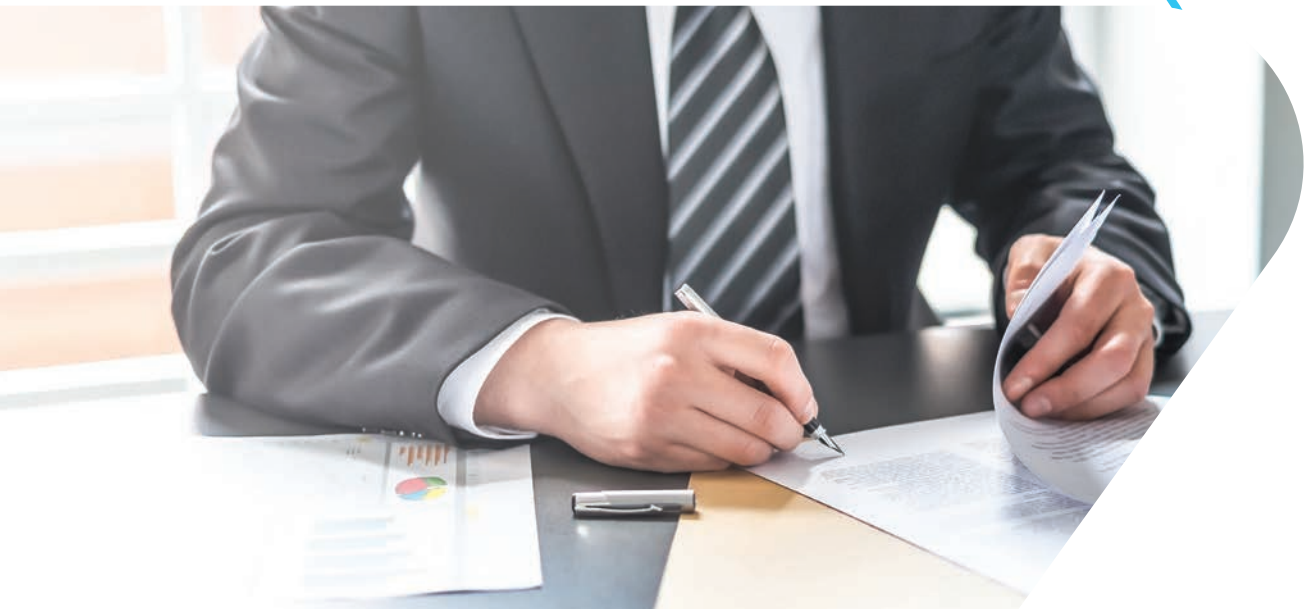
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A. HOW CAREVALUE CAN HELP YOU SUCCEED

CareValue is a Field Marketing Organization located in Upstate New York. We specialize in the senior insurance market, and we are dedicated to providing independent insurance agents and agencies with personalized service and technology.

CareValue prides itself on helping agents and agencies navigate the 'Medicare maze' in a highly regulated and complex market. Our team has the experience and the powerful resources you need to help you surpass the competition.

We have relationships with more than 50 carriers nationally including Life, Health, & Medicare. We provide our agents with preferred access to the products that their clients want.

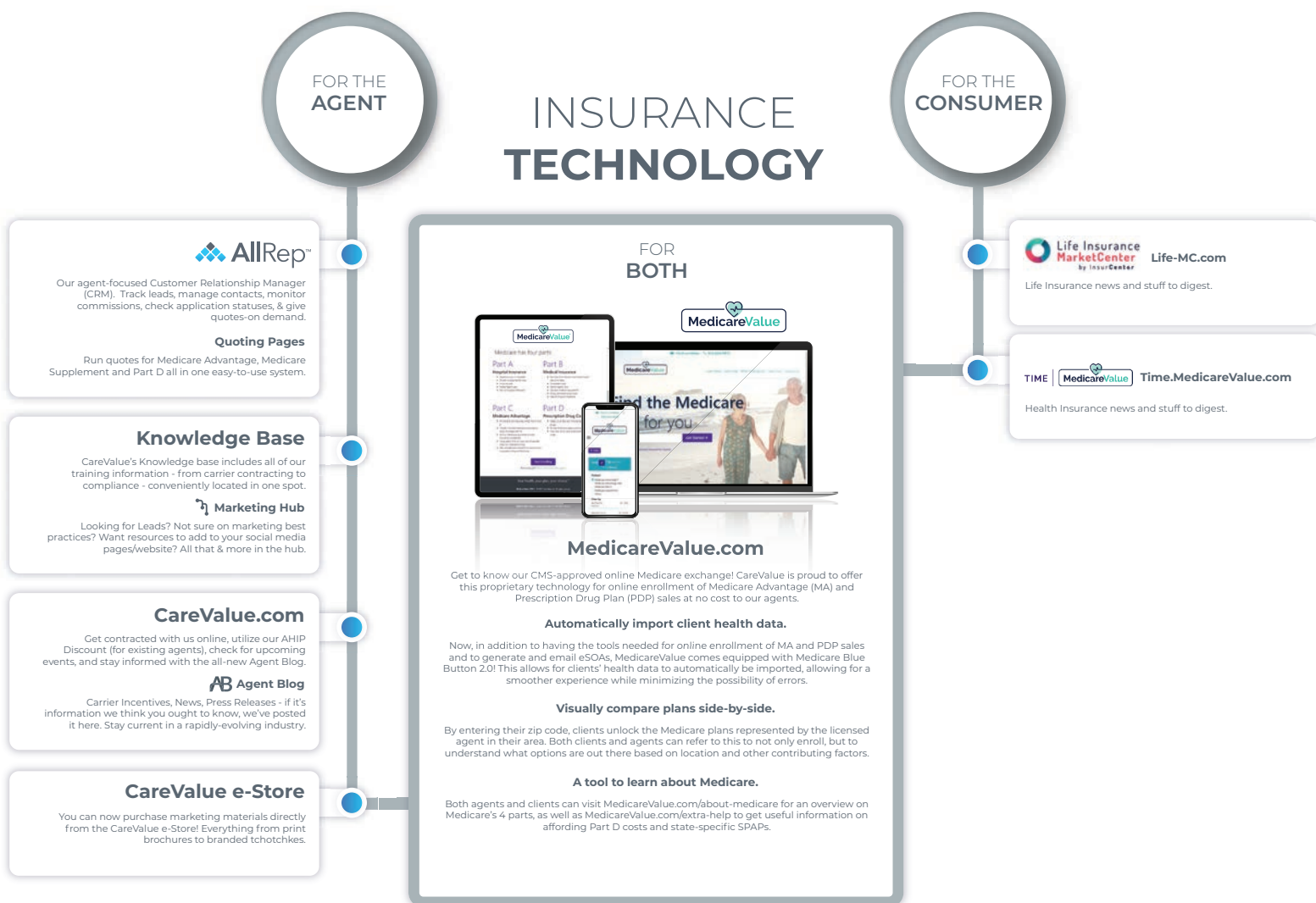
By partnering with us, you can represent the best products, receive competitive commissions, and enjoy dependable personalized service and support. We can help you diversify your portfolio and achieve long-term sustainable growth. Our size and reputation allow CareValue to negotiate competitive commissions and top contracts.

**LET US HELP
CATAPULT
YOUR BUSINESS
TO GREATER
HEIGHTS!**



B. TOOLS FOR AGENTS

When you're working in this industry, there are a lot of elements to balancing your time including accounting, business development and customer service. With CareValue, we help you automate processes to save you paperwork, time and stress. Our FMO has everything you need to manage your business and keep you compliant.



C. ALLREP CRM

Meet AllRep CRM, our Agent-Focused Customer Relationship Manager

The CareValue team understands how difficult managing your insurance business can be. That's why we designed our state-of-the-art CRM tool, AllRep.

This state-of-the-art CRM offers online enrollment tools and electronic quoting technology that streamlines business processes by allowing you to:

- Track leads
- Manage contacts
- Monitor commissions
- Check application statuses
- Get quotes on demand

Track Leads

Your leads automatically populate when you participate in the lead programs sponsored by CareValue.

Manage Contacts

With AllRep, you can streamline your contact management process. This tool allows you to set follow-ups, record call notes, and set dispositions - all on the same platform.

Monitor Commissions

Keep track of your commissions in one convenient dashboard via our exclusive ACOS® (ALL-Commissions in One Spot) system.

Check Application Statuses

AllRep's built-in Secure Application Manager (SAM) allows you to track your application submissions from submission to commission.

Get Quotes On Demand

With AllRep, you can compare plans in a matter of seconds, including Medicare Advantage, Medicare Supplement, Part D, Life solutions, and ancillary.



D. ONLINE AGENT CONTRACTING

Contract with Multiple Carriers within Minutes

CareValue makes it easy to contract with other insurance carriers. We offer two convenient options:

1

We can do the heavy lifting for you. Just complete the CareValue Consent 2 Contract (C2C) packet, and we'll contract with other carriers on your behalf.

2

You can use our online system to contract with various Senior, Life, and Health carriers within minutes. Just complete your agent profile and submit it along with your contracting requests.



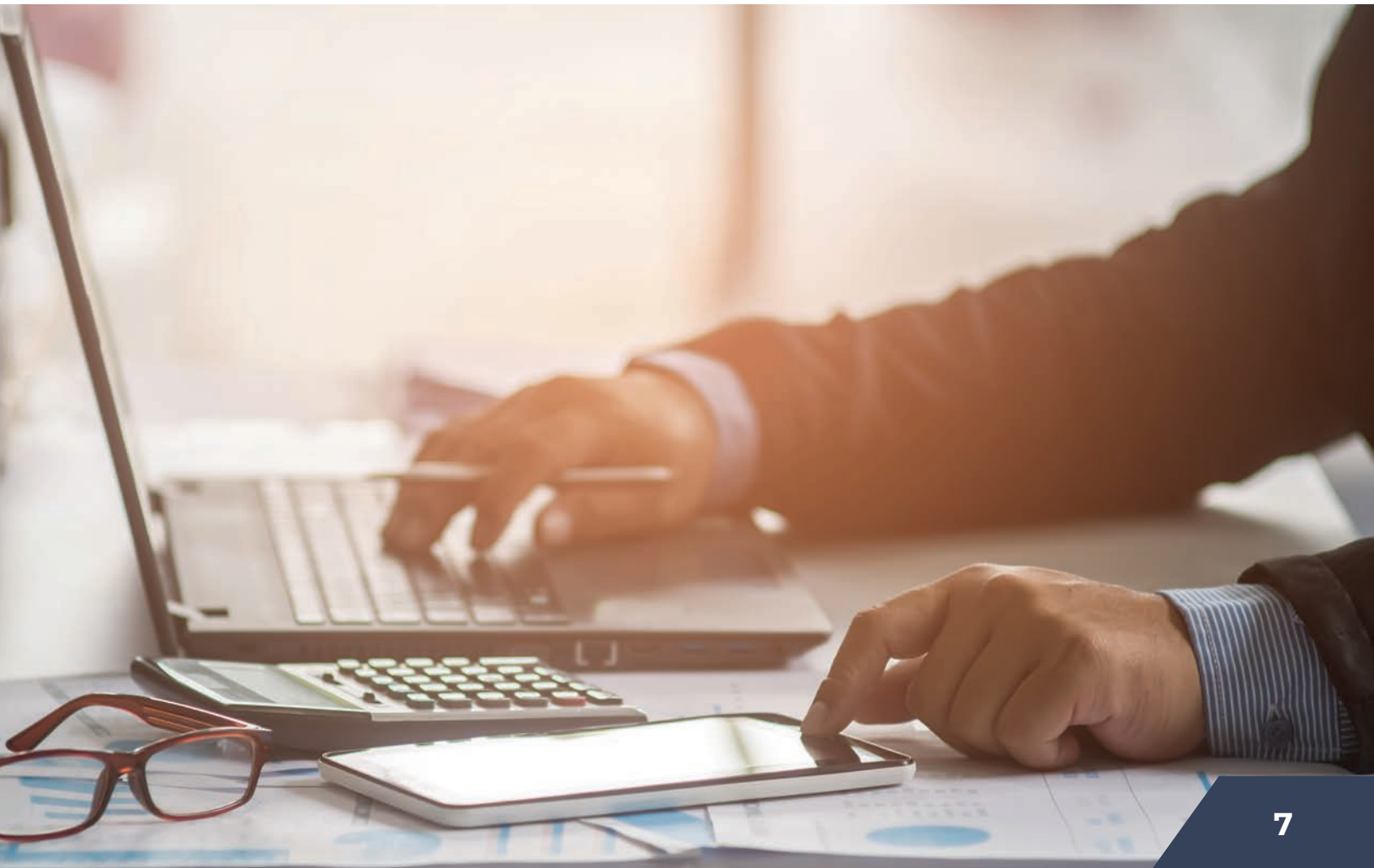
E. QUOTING ENGINES

Instantly Compare Plans Side-By-Side

CareValue's Market Advisor Quoting Tool saves you both time and money by allowing you to get the most accurate rates, product knowledge, and underwriting, all in one place. You can even compare plans side-by-side.

Our Market Advisor Quoting Tool is a one-stop comprehensive shop and provides instant quotes for the following plans:

- Medicare Supplement
- Medicare Advantage
- Term/UL
- Final Expense
- Senior Dental
- Prescription Drug Plans



F. TECHNOLOGY FOR MANAGING ENROLLMENTS

Manage Enrollments the Way that Works Best for You

At CareValue, we believe in making things easier for our clients. That's why we integrated the technology needed to support several different ways our clients can submit and manage enrollments, including:

MedicareValue

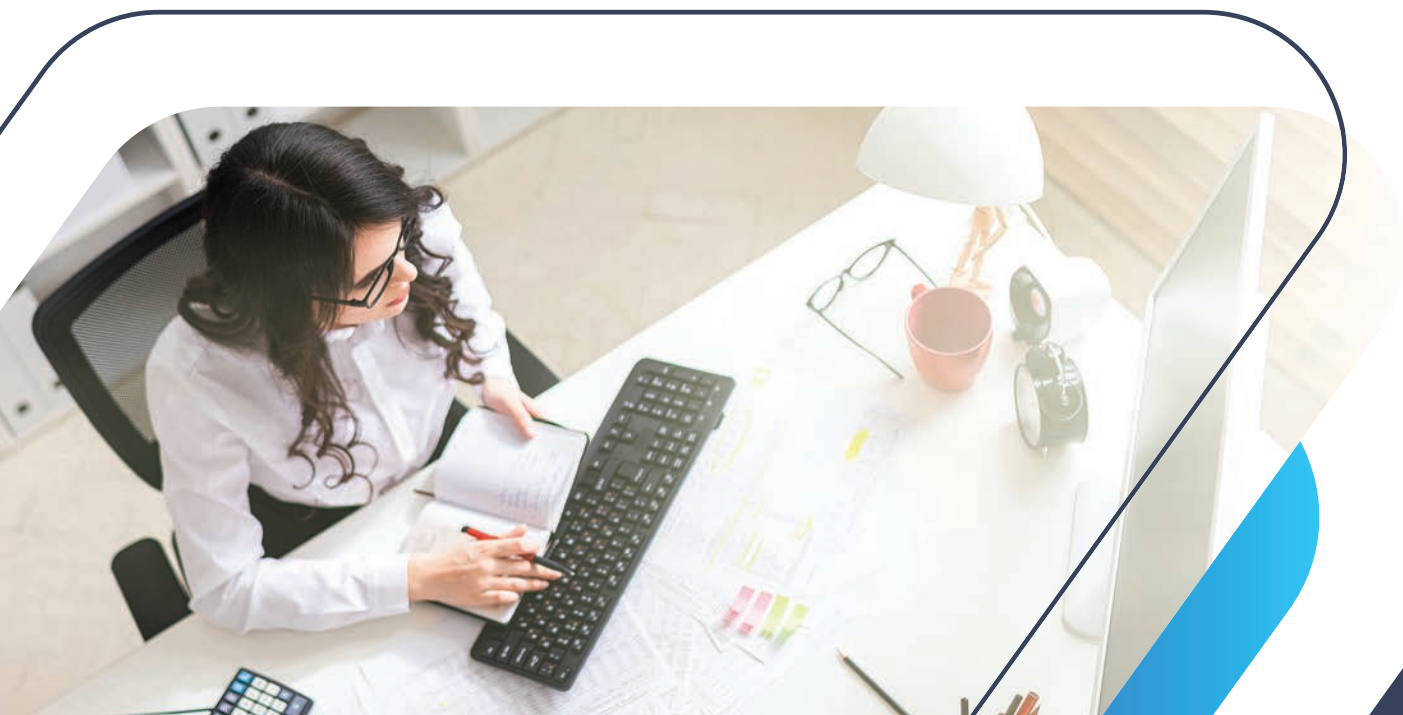
Our proprietary and CMS approved online enrollment exchange that offers free online enrollment of MA and PDP sales.

With MedicareValue, you can easily compare plans, collect Scopes of Appointment (eSOAs), complete applications remotely or face-to-face, and market yourself in unique and powerful ways. The best part of MedicareValue is that it's completely free to agents that partner with CareValue; that is right, no additional costs or commitments.

MedicareValue360 (MV360)

MedicareValue360 is an agent-facing platform that simplifies and expedites the Medicare health plan shopping experience for agents and members. Clients and prospects can create a profile on MedicareValue which allows them to manage data permissions with their agents through [Medicare.gov's Blue Button 2.0](#).

MedicareValue360 gives agents real-time access to their client's data from [Medicare.gov](#). MedicareValue360 allows agents to store and save member health, subsidy, drug, pharmacy, and provider information year over year – empowering agents to leverage historical data to assist their clients in selecting a Medicare plan that is both economical and unbiased.



G. SECURE EMAIL

A Secure and Compliant Email Solution

The CareValue team takes security seriously. That's why we have implemented a secure HITECH and HIPAA-compliant email solution from Zix Corporation which automatically encrypts any emails with sensitive information, like social security numbers, account numbers, or member IDs. When you partner with CareValue, you can take comfort in knowing that you can securely pass sensitive information to and from your customers regarding their insurance.



H. CAREVALUE E-STORE

Customized Marketing Tools

Our CareValue e-Store gives our agents access to customized marketing materials. You can purchase everything from digital collateral to print brochures and branded promotional items. You can even buy new leads! Also, there are many items you can customize and download for free.



I. KNOWLEDGE BASE & ONGOING TRAINING

CareValue's Knowledge Base is a one-stop-shop! This tool allows you to look up carriers and other operational information to improve your business. It gives you access to our training information - from carrier contracting to compliance.

Our Knowledge Base also includes:

- Compliance Corner
- New Agents Getting Started
- Carrier Information
- Contracting
- MedicareValue (Resources on how to use MedicareValue)
- MedicareValue360 (MV360)
- New Business
- Content Resources, including [Time.MedicareValue.com](https://www.time.medicarevalue.com) & [LifeInsuranceMarketCenter.com](https://www.lifeinsurancemarketcenter.com)
- Marketing Tips and Best Practices

Agents are always at the forefront of our business. We provide regular training videos and other collateral to assist our agents on using our technology, accessing resources, and maximizing their opportunities through AllRep.



J. MARKETING

Adapting to market trends is always a challenge when you're focused on growing your business and maintaining your customer relationships. At CareValue, we have our thumb on the pulse of the market - including sticky marketing tactics.

We help agents market through a multitude of ways including:

- Referral Marketing
- Cross-Selling Opportunities
- Tele-Sales
- Customer Communication
- Content Creation
- Platform Training



All these items are housed in our Marketing Hub, a branch of our Knowledge Base, designed to provide you with information including best practices for agent marketing efforts, and resources that you can leverage on your website, email marketing, and social media channels.

GET CONTRACTED TODAY!

**We hope you find our modern tools perfect for your modern agency.
If you aren't already a CareValue agent, get contracted today!**

GET STARTED