



Because You're Different

CalBar Quarterly Meeting Update

**Presentation By
Steve Williams**

May 23, 2016

***Independently Owned,
Independent Thinkers***

Heffernan Team Supporting CalBar Members

Steve Williams

President – Benefits &
Financial Services

Marc Paletta

SF Branch Manager Group
Benefits

Christopher Mason

Benefits Advisory Services

Team of 6 Senior
Benefits Specialists

Heffernan Team Supporting CalBar Members

Online Registration:

- ✓ 5 simple questions
- ✓ HIB Member reaches out to CalBar Member within 24 hours

Dedicated 800 #:

- ✓ Voicemail available for afterhours



Banner Ads

- ✓ HIB Newsletters
- ✓ HIB Advertising
- ✓ CalBar Annual Meeting
- ✓ CalBar Planning Meeting

Services Offered



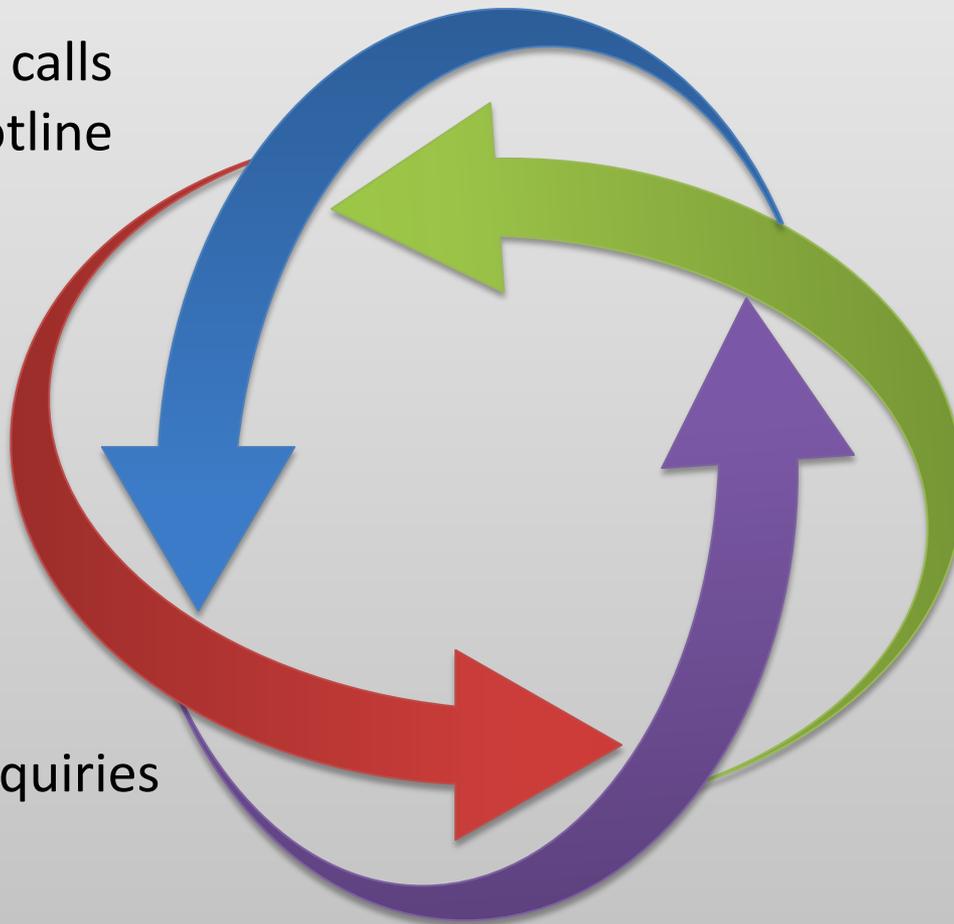
Statistics for January 2016 through April 2016

56 Member calls
to our hotline

Quoted 10 small
group plans – 0 sold

Individual policies-
15 sold

280 Web Inquiries



4th Qtr 2015 & 2016 Planned Marketing Activities

- Purchased a booth and attended the State Bar Annual Meeting in Anaheim, CA - October 2015
- Attending COGIP's Planning session in Rancho Pales Verdes, Ca – November 13th & 14th
- CalBar Connect Visibility
 - State Bar sponsored HealthCare Program
 - ✓ Link, Video, ACA Compliance Tools, Online Rating Tools, on-going Newsletters and Legislative Updates
 - ✓ Participating in any CalBar Sanctioned Advertising or Mailers to Members
 - ✓ Heffernan to be included in the “Bar Card” carrier mailer
 - ✓ CalBar Connect Mailing – sent to all Attorney's once they pay their dues
- Marketing campaign through list of all attorneys in CA through email explaining Heffernan's benefit advisory services.
- Broadcast Heffernan's benefit services through LinkedIn Lawyer association groups.
- Enhanced partnership with AI&PS
 - HIB refers all long term care and disability to AI&PS
 - AI&PS refers all existing/perspective long term care & disability clients to HIB
- Technology Enhancements
 - Videos explaining how to purchase Medical Insurance
 - Flock – All-in-one HR & Benefits Administration Platform
 - On-line quoting engine, real time personal support & more
- Guidance/Support from the Committee on any activities not listed above