



*Because You're Different*

# **CalBar Quarterly Meeting Update**

***Independently Owned,  
Independent Thinkers***

**Presentation By  
Steve Williams**

**May 23, 2016**

# 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 #:

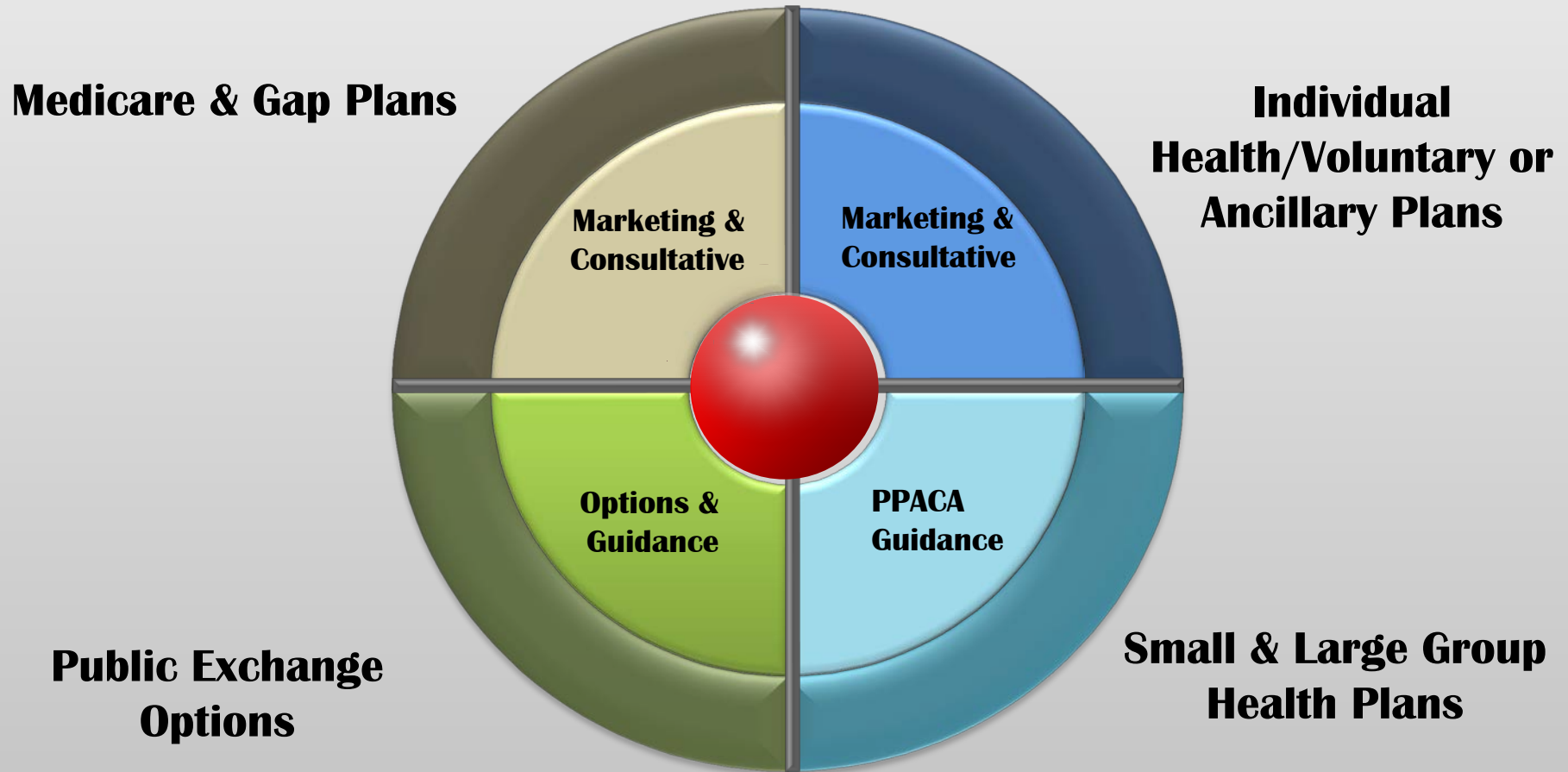
- ✓ Voicemail available for afterhours



## Banner Ads

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

# Services Offered



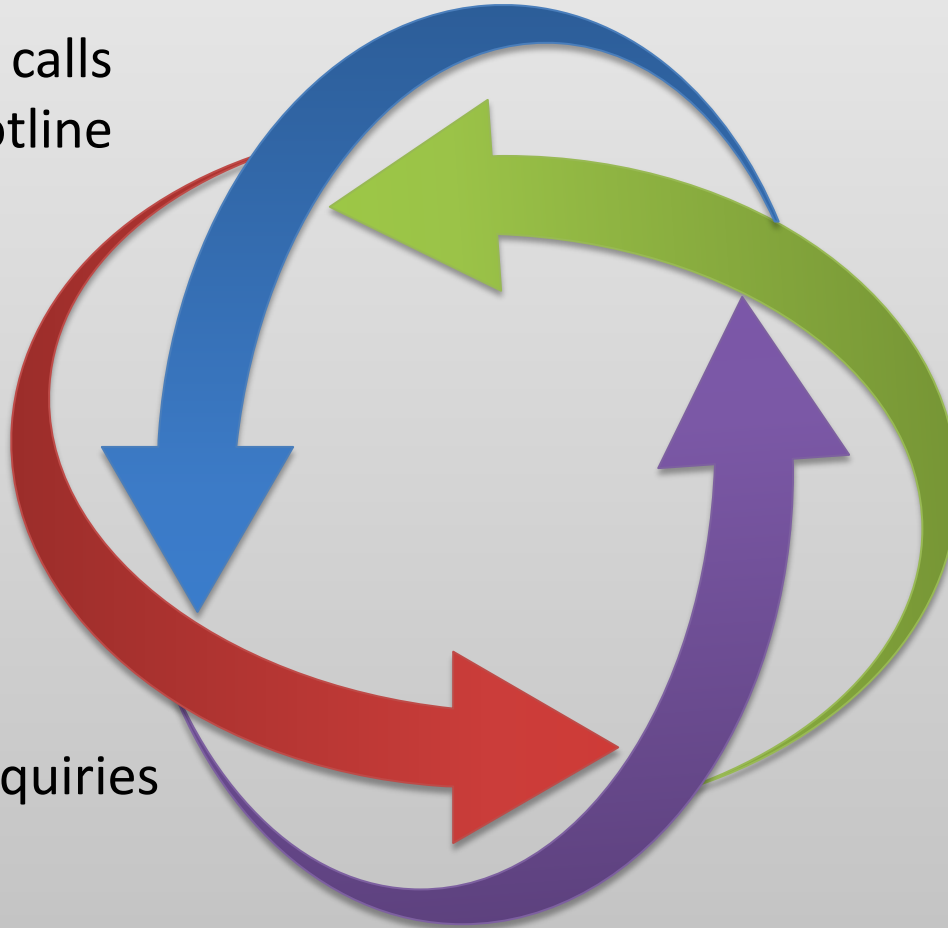
# Statistics for January 2016 through April 2016

56 Member calls  
to our hotline

Quoted 10 small  
group plans – 0 sold

Individual policies-  
15 sold

280 Web Inquiries



# 4<sup>th</sup> 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 13<sup>th</sup> & 14<sup>th</sup>
- 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