

SERFF Tracking Number: BNLA-125773827 State: Arkansas
Filing Company: Bankers Life and Casualty Company State Tracking Number: 39921
Company Tracking Number: 17459
TOI: MS06 Medicare Supplement - Other Sub-TOI: MS06.000 Medicare Supplement - Other
Product Name: Medicare Supplement
Project Name/Number: Non-Responder Phone Script - On or Needs Medicare/17459

Filing at a Glance

Company: Bankers Life and Casualty Company

Product Name: Medicare Supplement SERFF Tr Num: BNLA-125773827 State: ArkansasLH
TOI: MS06 Medicare Supplement - Other SERFF Status: Closed State Tr Num: 39921
Sub-TOI: MS06.000 Medicare Supplement - Other Co Tr Num: 17459 State Status: Filed-Closed

Filing Type: Advertisement Co Status: Reviewer(s): Stephanie Fowler
Author: Janice Fron Disposition Date: 09/09/2008
Date Submitted: 08/13/2008 Disposition Status: Filed-Closed

Implementation Date Requested: On Approval

Implementation Date:

State Filing Description:

General Information

Project Name: Non-Responder Phone Script - On or Needs Medicare Status of Filing in Domicile: Pending
Project Number: 17459 Date Approved in Domicile:
Requested Filing Mode: Review & Approval Domicile Status Comments:
Explanation for Combination/Other: Market Type: Individual
Submission Type: New Submission Group Market Size:
Overall Rate Impact: Group Market Type:
Filing Status Changed: 09/09/2008
State Status Changed: 09/09/2008 Deemer Date:
Corresponding Filing Tracking Number: 17459

Filing Description:

TO: Insurance Department Personnel

RE: MEDICARE SUPPLEMENT ADVERTISING

Invitation To Inquire

Lead Generating Non-Responder Phone Script

Form Number: 17459

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Dear Sir or Madam:

In accordance with your state's requirements, we are filing the above captioned form for your review. This phone script will be used as a follow-up for prospects who did not respond to our mailing. This will provide an opportunity for them to arrange a time for a personal meeting with our licensed insurance agent to discuss the Medicare Supplement policies that Bankers currently offers that are approved for sale in your state.

These forms are being filed simultaneously on a nationwide basis and include our home state of Illinois.

Your consideration prompt approval of our filing is sincerely appreciated.

Very truly yours,

Janice D. Fron

Product Approval and Compliance

Company and Contact

Filing Contact Information

Janice Fron, Filing Project Leader j.fron@banklife.com
222 Merchandise Mart Plaza - 19th Floor (312) 396-7538 [Phone]
Chicago, IL 60654 (312) 396-5907[FAX]

Filing Company Information

Bankers Life and Casualty Company CoCode: 61263 State of Domicile: Illinois
600 West Chicago Ave Group Code: 233 Company Type:
Chicago, IL 60654-2800 Group Name: State ID Number:
(800) 621-3724 ext. [Phone] FEIN Number: 36-0770740

Filing Fees

Fee Required? Yes
Fee Amount: \$25.00
Retaliatory? No
Fee Explanation: AR requires \$25.00 per form.

SERFF Tracking Number: *BNLA-125773827* *State:* *Arkansas*
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Per Company: *No*

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COMPANY	AMOUNT	DATE PROCESSED	TRANSACTION #
Bankers Life and Casualty Company	\$25.00	08/13/2008	21920476

CHECK NUMBER	CHECK AMOUNT	CHECK DATE
	\$0.00	

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Correspondence Summary

Dispositions

Status	Created By	Created On	Date Submitted
Filed-Closed	Stephanie Fowler	09/09/2008	09/09/2008

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Disposition

Disposition Date: 09/09/2008

Implementation Date:

Status: Filed-Closed

Comment:

Rate data does NOT apply to filing.

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Item Type	Item Name	Item Status	Public Access
Form	Non-Responder Script - On or Needs Medicare	Filed	Yes

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Form Schedule

Lead Form Number: 17459

Review Status	Form Number	Form Type	Form Name	Action	Action Specific Data	Readability	Attachment
Filed	17459	Advertising	Non-Responder Script - On or Needs Medicare	Initial		0	17459 - Non-Responder Script.pdf

Bankers Life and Casualty Company **Non-Responder Script – On or Needs Medicare**

GOOD MORNING! (*wait for response*)

Mr./Mrs. _____, this is _____. I'm an insurance agent with Bankers Life and Casualty Company. How are you? (*wait for response*)

Great! The reason for my call is that I'm trying to meet with everyone in the area that is either on Medicare or that's getting ready to go on Medicare. I might be able to take care of your insurance needs by showing you the products we offer here at Bankers. Do you [or your spouse] fall into one of those categories? (*wait for response*) (*If yes, continue. If no thank you, end the call politely.*)

I am putting together some information regarding:

- *For those on Medicare:* The changes in Medicare for this year and how these changes may affect your current insurance coverage
- *For those Turning 65:* Medicare.

May I ask you a couple quick questions so that I know what pamphlets to put in? (*If yes, continue. If no thank you, end the call politely.*)

- Are you retired?
- Are you married?
- Most people carry something to go along with Medicare like a supplement. Do you have any policy like that? (*wait for response*) What do you carry? (*wait for response*) [That's great!] This information will be really helpful.

Outstanding! I'll be in your neighborhood on _____ getting this insurance information to folks in your area. I would like to sit down and go over this information with you. Are mornings or afternoons better for you? (*wait for response*)

Great! I've got some time around _____ that (*morning/evening*). Does that work for you? (*wait for response*) Perfect.

Now, I have your address as _____, is that correct? (*wait for response*)

I am required to inform you that neither Bankers nor its agents are connected with or endorsed by the Federal Medicare Program.

Like I said, I'll be there around _____. Would you please put my name on your calendar [and let your (*husband/wife*) know that I'll be there? (*wait*)]

Is there any trouble finding your house? (*wait for response*)

And incase I can't see the number, what color is your house? (*wait for response*)

Wonderful, have a good (*day/weekend*)? I look forward to seeing you!!

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Rate Information

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