

# Roundtable: Marketing

April 25, 2024



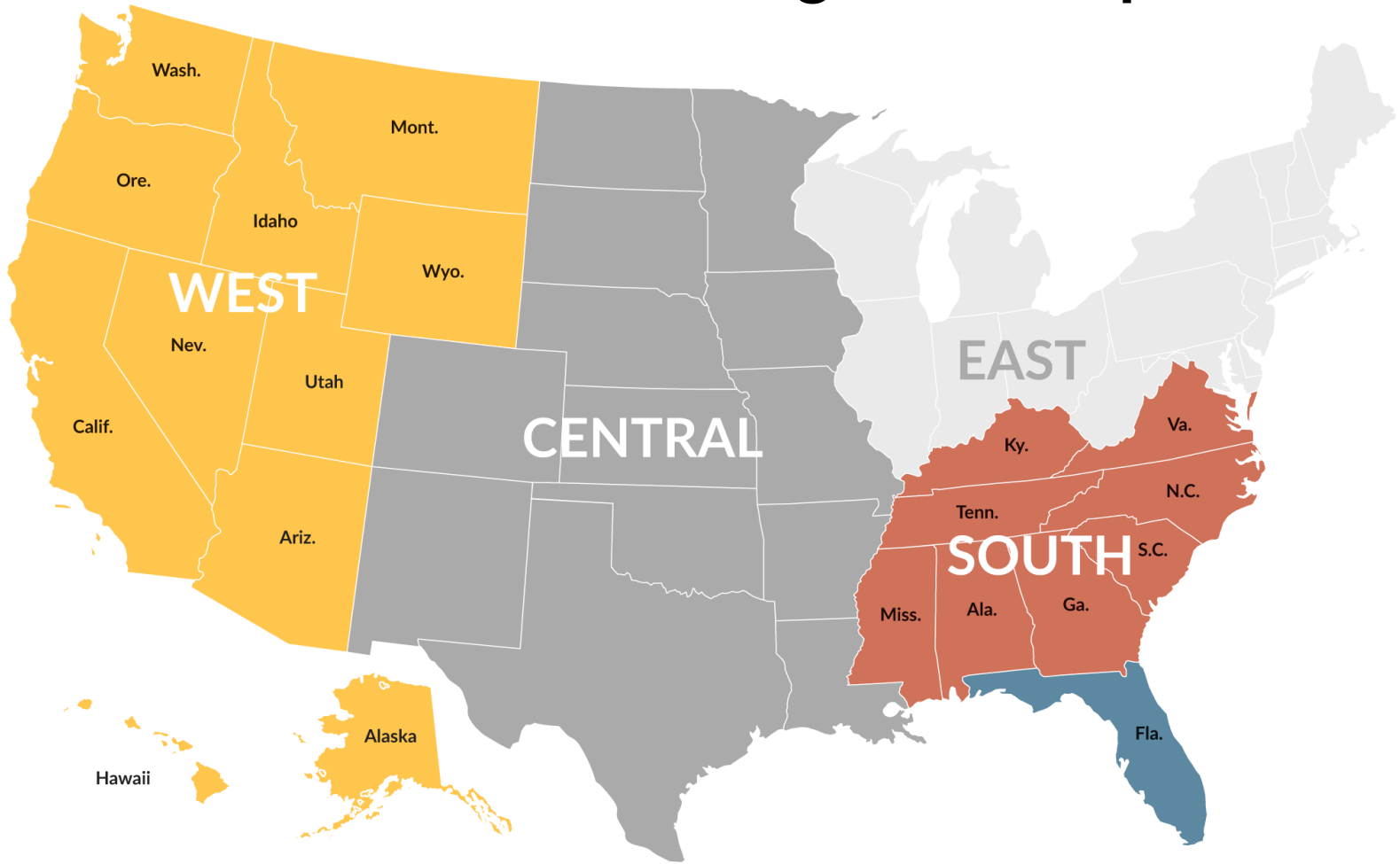
# Agenda

- Program Updates
- Training Schedule
- Marketing Presentation
  - Mark Stevenson, Senior Director, Business Development/Products and Services
  - Michele Armesto, Senior Associate/Senior Relationship Manager, AMBA
- General Questions or Comments

# Program Updates

- AMS Transition
  - Progressing – CM and NRT anticipated early next week
- Chapter Dues Portal (Glimmernet)
  - Final testing
- Copyright Infringement Issue
- BK video recognizing National Volunteer Week April 21-27
- MOAA Foundation Community Outreach Grants Announced (49 winners)

# 2024 Leader Training Workshops



**Leadership Seminar**  
Orlando, FL  
January 25-27  
FL, Other C&C by invitation

**Virtual Workshop**  
New Leaders  
March 27  
Focused on New Chapter Leaders

**South Workshop**  
Greenville, SC  
May 17-18  
AL, GA, KY, MS, NC, SC, TN, VA

**Virtual Workshop**  
Experienced Leaders  
August 14  
Focused on Experienced Leaders

**West Workshop - Reno, NV**  
November 15-16  
AK, AZ, CA, HI, ID, MT, NV, OR, UT, WA, WY



# 2024 Roundtable Schedule

January 18* Compliance and Legal Topics	February 29 Committee Module	March 28 Advocacy in Action	April 25 Marketing
May 23 Individual Awards Program	June 27 Generational Recruiting	July 25 Chapter Health Update	August 29 Council/Chapter Visit Program
September 26 TBD	Oct 24* Community Outreach	November 21* MOAA Annual Awards	December 19* 2024 review 2025 preview

\* Adjusted from 4<sup>th</sup> Thursday to Avoid Conflict





# Chapter Roundtable: Marketing (Products & Services)

April 25, 2024



# PARTNER UPDATE

## Opportunities

- Consumer Cellular
- Identity Guard (Aura)
- MOAA Vacations

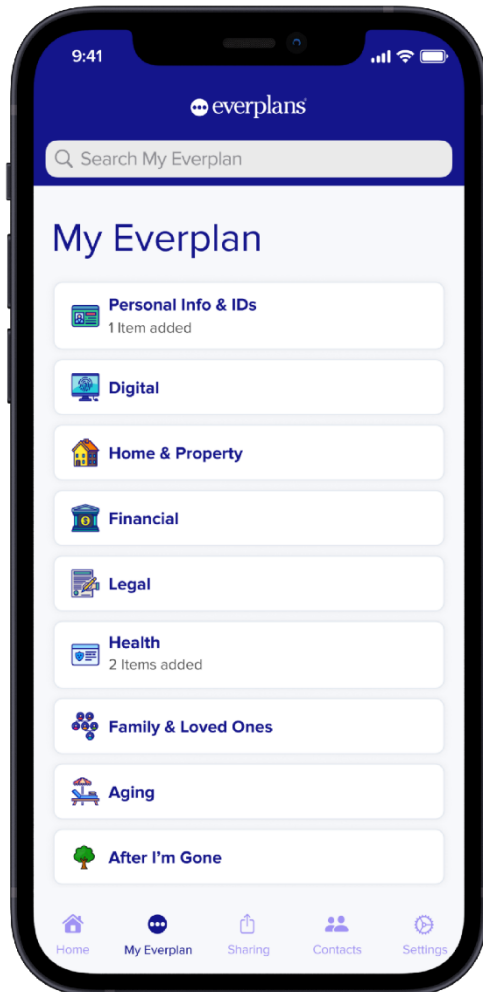
## Updates

- Everplans
- BetterUp
- EA+/MASA Move
- The MOAA Store

# Everplans

[www.moaa.org/everplans](http://www.moaa.org/everplans)

*A digital estate planning tool designed to securely organize & store your vital information.*



- **Secure Storage:** Data is encrypted and protected using leading privacy and security technology.
- **Guidance:** A step-by-step interface guides users
- **Sharing:** Members can safely share their plan with “Deputies”

## Member Offerings:

- **LIFE:** Complimentary 1-Year Everplans Premium (70% off subsequent years)
- **PREMIUM:** 40% off Everplans Premium
- **BASIC:** 30% off Everplans Premium

*Everplans Premium - \$99/year (retail)*







# BetterUp (NEW)

Growth and enhanced performance through individual life coaches

## Includes:

- 1-on-1 virtual coaching
  - 30 minutes per month
  - Coach Guarantee
  - Unlimited messaging
- Specialty coaching
- Interactive workshops
- Member in full control

## Member Offerings:

- LIFE: 30% discount off special 6-month MOAA rate
- PREMIUM: 15% off special 6-month MOAA rate
- BASIC: receive the special MOAA rate

Emergency Assistance Plus® (EA+®)

We know the value of planning for the unexpected.

No matter what emergency may strike, we'll always have your back.

Emergency Assistance Plus® (EA+®)

## EA+® HELPS YOU TRAVEL CONFIDENTLY

- Emergency medical evacuation if hospitalized
- Nurse Escort (medically necessary)
- Airline ticket to bring loved ones by your side
- Tickets home for up to 3 travel companions
- Vehicle return if you are unable to drive home
- Pet Care
- Hotel/Emergency cash (against valid credit card)



BUSINESS SENSITIVE - PLEASE DO  
NOT DISTRIBUTE

# The MOAA Store

## Councils & Chapters Items

- Under the Councils & Chapters section, you will find ROTC/JROTC medals, various certificates, gold bar kits and more!
- Customizable items are available such as tablecloths, flags, drinkware, and more.



In addition to the C&C section, many new inventory items have been added to the store! Please visit [www.moaa.org/store](http://www.moaa.org/store) to browse all available items!

# Questions



# MOAA Insurance Plans

## Chapter Liability

April 2024

# MOAA Endorsed Insurance Program

## MEDIPLUS TRICARE Supplements

- TRICARE Prime
- TRICARE Select
- TRICARE Reserve Select
- TRICARE Retired Reserve

## Short Term Recovery Over 65

## Hospital Indemnity Under 65

## Long Term Care Insurance

## Vision Insurance

## Pet Insurance

## Life Insurance Products

- Group Annual Renewable Term
- 10 -, 15 -, and 20 - Year Level Term
- Active Service Discharge Plan
- Joint Term
- Youth Term
- Senior Whole

## Accidental Death and Dismemberment

# Council & Chapter Programs

## Council & Chapter Advertising Program

- January 1 – May 31
- Promotes MOAA Insurance Plans
- 8<sup>th</sup> year of the program
- Chapter receives a one-time annual payment of \$100 for running the ad in newsletter/website
- 2023: 76 participating councils/chapters (\$7,600)
- 2024: 47 participating councils/chapters (3/2024)

## Chapter Liability Program

- Offers liability insurance for MOAA Councils/Chapters
- Provides coverage for lawsuits resulting from bodily injury and property damage at sponsored activities
- 76 currently insured chapters (2024)
- \$1M of liability protection for each occurrence and up to \$2M aggregate per year

**Standing with you at every stage.**

**MOAA Insurance Plans**

**MOAA Insurance Plans Advertising Program for Councils and Chapters.**

MOAA Insurance Plans is continuing the advertising program for MOAA Councils and Chapters. A digital and print ready advertisement promoting MOAA Insurance Plans is available by request. If a Council or Chapter would like to place the advertisement online or in a newsletter or other publication, they will be provided a copy of the advertisement and a payment of \$100.

**When you'll receive the advertisement and \$100 payment:** Once your email request to Michelle Armetto (michelle.armetto@moaa.info) is submitted with all the necessary information, we will begin processing your request.

**What you need to know:**

**Limited-Time offer:** If you would like to participate in this program, MOAA Insurance Plans will only accept advertising requests from January through May each year. We ask all Councils and Chapters to submit requests during this period, even if you may not publish your advertisement until a later date.

**How to enroll:** Enrolling in advertising program is easy.

1. Send an email request to Michelle Armetto (michelle.armetto@moaa.info) at AMBA's Insurance Administration calendar year with "Council/Chapter" in the subject line.
2. Include your contact information completed W-9 form for your email request.
3. We will start processing your request.

This program is offered through AMBA Administration, Inc. 2025-2026 (1/1/25 through 5/31/26). AMBA.org

**MOAA CLUB AND CHAPTER LIABILITY INSURANCE PLAN**

Protect your organization's resources against a costly lawsuit!

**ONE PLAN — COMPLETE PROTECTION**

This plan provides extensive coverage for lawsuits resulting from bodily injury and property damage at chapter or club-sponsored activities. This includes concession stands, dances, banquets, parties, fundraisers, parties and meetings, to name just a few. Coverage would also apply for official club or chapter participation, for instance, participating in a community-sponsored event.

If your club or chapter typically rents space when it needs to gather for a meeting or special event, you or someone discovered that the owner of the property requires you to purchase a "special event" insurance policy that is typically very expensive to buy or does not protect you fully for the event you're planning.

With the Club and Chapter Liability Insurance plan you don't have to deal with this disappointing aspect of planning. This plan provides you with the insurance coverage you need to hold your event — you don't have to apply for a separate policy every time you are in the midst of organizing. This plan is with you throughout the year!

**\$1 MILLION OF LIABILITY PROTECTION AT AFFORDABLE RATES**

The Club and Chapter Liability Insurance policy provides up to \$1 million in coverage for each occurrence and up to \$2 million in aggregate coverage each year. Each club or chapter interested in this liability insurance can receive a no-obligation premium quotation. Since each club or chapter is different in its activities, premiums are determined on an individual basis. However, since this plan is available to all clubs and chapters, each club and chapter has the advantage of group buying power and all premiums are kept to a minimum.

**NOTICE TO CURRENT POLICYHOLDERS**

MOAA's Chapter Liability Insurance plan is available through the current calendar year (12/31). Should your chapter have a new or renewed policy prior to that date, the policy will not renew for you past that effective date. MOAA has evaluated several carriers and selected a new carrier. Participating insurance companies will continue to provide this valuable coverage with no-notice discontinuation. You will receive application instructions from MOAA by email or mail if your email address is on the appropriate list prior to your current policy's expiration date.

If you have any questions or would like to apply for a new policy, please feel free to contact MOAA at 800-363-6227. MOAA's address is: 1000 North Central, Suite 2000

**Who it's for:**

- Insured clubs and chapters
- Officers and members acting on behalf of the club or chapter

**What you get:**

- Up to \$1 million of liability protection for occurrence basis
- Coverage for bodily injury or property damage which doesn't result from a crime or as a result of club or chapter activities



# Chapter Liability | Carrier Environment

## AIG

- AIG notice of termination/non-renewal of the General Liability
- AMBA has selected Philadelphia insurance
- AIG renewed policies through 12/31/2023 (they will be non-renewed upon their 2024 expiration date)
- Options for replacement coverage

## AMBA

- AMBA identified Philadelphia Insurance Companies to replace AIG effective 6/1/2023
- AMBA is working with Special Markets Insurance Consultants (SMIC) and Great American Insurance Group to add additional underwriting carriers
- Chapters and Statewide coverage



# MOAA Contact Information

- Customer Service: Monday-Friday, 7:30 a.m. to 7:00 p.m. CST for MOAA members
- State of the art call center located in Urbandale, Iowa
- Website has click-to-chat capability
- Insured Members visit My Account on the [www.moainsurance.com](http://www.moainsurance.com) website to manage your account

## For Councils and Chapters



515.721.7034

David.shidler@getamba.com

## For Members



1.800.247.2192

CALL CENTER HOURS

Monday-Friday: 7:30 a.m. to 7:00 p.m. CST

## For Members



[www.moainsurance.com](http://www.moainsurance.com)

[moaa.service@getamba.com](mailto:moaa.service@getamba.com)



# Open Discussion & Questions

