

## **BUXMONT CHAPTER**

PA: PX-000501L , NJ: 20CE00159200, NY: 002280, IRS: E3S5R

### **Medicare**

**Please Note: This is a BREAKFAST meeting**

**Tuesday, September 29, 2026**

**Important—Please Read!** This meeting is being offered both in-person and virtually as a webinar.

If you choose to attend virtually, you will need an email address to receive the link to access the webinar (please fill out email address below) and a device to view the webinar (PC, laptop, iPad, tablet). The link will be provided through email prior to the webinar.

The in-person meeting will be held at the Pinecrest Country Club, 101 Country Club Dr., Lansdale, PA 19446 (215) 855-4113.

**CPE: 2 hours Federal Tax 9:00—11:00 a.m.**

*(Registration 8:00 a.m., Breakfast Buffet 8:15—9:00 a.m., CPE 9:00—11:00 a.m.)*

**Registration Deadline: 9/25/2026**

**Speaker: Tracy Keesey, President/CEO, HTA Insurance Services**

NAME: \_\_\_\_\_ PTIN # \_\_\_\_\_

Street Address: \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_

I will attend in-person at the Pinecrest Country Club (includes Breakfast Buffet):

PSTAP Member (\$60)     Non-Member (\$80)

I will attend virtually via webinar:  PSTAP Member (\$60)     Non-Member (\$80)

**Mail form to: PSTAP, 150 Corporate Center Dr., Ste. 205, Camp Hill, PA 17011**

**Fax form to: 717-614-8663 Register Online at: [www.pstapcpe.com](http://www.pstapcpe.com)**

Check made payable to Buxmont Chapter PSTAP is enclosed.

VISA/Amex/MC/Disc Acct # \_\_\_\_\_ Exp: \_\_\_\_\_ CVV: \_\_\_\_\_

Signature: \_\_\_\_\_

## **Medicare Course Description:**

This course provides a practical overview of Medicare eligibility, coverage options, and enrollment timing. Participants will learn how Medicare Parts A–D function, compare Medicare Advantage and Medicare Supplement plans, and understand enrollment deadlines, penalties, and coordination with employer group coverage. The course equips professionals with the knowledge needed to guide clients approaching Medicare eligibility and help them avoid common enrollment mistakes.

## **Learning Objectives**

After completing this course, participants will be able to:

1. Explain Medicare eligibility requirements and the structure of Medicare coverage.
2. Describe the benefits and costs associated with Medicare Parts A, B, C, and D.
3. Compare Medicare Advantage and Medicare Supplement plan structures.
4. Identify key enrollment periods and recognize potential late enrollment penalties.
5. Evaluate how Medicare coordinates with employer group health coverage.

## **Speaker Bio: Tracy Keesey, President/CEO, HTA Insurance Services**

As Owner and CEO, Tracy Keesey has been instrumental in driving HTA Insurance Services' growth and expansion. Under her leadership, the company has achieved remarkable milestones, including shifting the overall business model to focus on guiding the clients of financial advisors through the daunting and complicated Medicare selection and enrollment process. This important transition led to the development of The Client Services Division (Retail Division), which still prospers today.

In 2021, Keesey sold the Wholesale Division of HTA to Ritter Insurance Marketing. Under the agreement HTA continues to operate the Medicare, Life, and LTC businesses allowing for the focus to be direct to consumer sales, Keesey's true passion.