

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: CJ Whitmire, Sr. Relationship Manager—Team Leader, 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

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: CJ Whitmire, Sr. Relationship Manager – Team Leader, HTA Insurance Services

CJ Whitmire is a licensed insurance professional with a strong focus on Medicare education, client support, and relationship management. At HTA Insurance Services, a national Medicare brokerage firm, CJ works closely with brokers, employer groups, and individual clients to help simplify Medicare and retirement healthcare decisions.

CJ earned a Bachelor of Science from West Chester University in 2019 and a Master of Fine Arts from Temple University in 2023. With experience in Life, Health, Accident, and Property & Casualty insurance, CJ brings a well-rounded perspective to coverage planning, ensuring clients receive clear guidance that aligns with their goals, needs, and budgets.

Known for a collaborative approach and clear communication style, CJ is passionate about helping clients feel confident and informed as they navigate their Medicare options.