



CMS Regulation for Third-Party Marketing

The purpose of this communication is to help provide you, our valued partner with:

- Clarification regarding the most recent CMS regulation guidance
- Our assistance with your adherence to this guidance

CMS issued a memo on October 8, 2021. It reviews guidance related to Third-Party Marketing and CMS filing requirements. This memo impacts the way the Medicare industry previously interpreted existing guidance. [Click here to view the CMS Third-Party Marketing memo and related content](#) including marketing examples.

We are here to help. What does this mean for you? You have two options.

Option 1: If you want to use marketing materials that DO mention any benefits even when they are not plan or carrier specific, you must:

- complete this [Carrier Agnostic Marketing Materials Submission spreadsheet](#), and
- submit your marketing piece and spreadsheet to the CareFree Compliance team carefreecompliance@carefreeinsurance.net

We'll obtain carrier and CMS approvals for you — both of which are required *before* you can start using a marketing piece.

Option 2: If you want to use or create materials that DO NOT contain ANY benefit information please do so. These non-benefit, generic materials don't require review and approval from carriers and CMS prior to using. Such pieces still require review by CareFree Compliance as they always have. [Click here to view pieces available for use on our website.](#) Note: Non-branded versions are available for agencies that use their own logo and agency name, all others should use CareFree versions.

Please contact the [CareFree Compliance Team](#) with any questions or concerns. We're happy to help or provide any necessary guidance.

Questions about this guidance? Ask our Compliance Team at a Q&A Session.

Date: October 28, 2021
Time: 3:00 - 4:00 PM ET

Date: November 2, 2021
Time: 11:00 AM - 12:00 PM ET

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CareFree Insurance Services, Inc.

We're here for you!

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