Meet New NABIP-TX President Stacy Cochran

Live Laugh Learn

Summer 2024

National Association of Benefits and Insurance Professionals

NABIP-Texas

The Official Publication of the National Association of Benefits and Insurance Professionals - Texas

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NABIP - TX Magazine - Vol. 34, No. 4
The Official Publication of the
National Association of Benefits and Insurance Professionals - Texas Editor / Ron Byrd

The Infinitus Group
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Honorary Editor / Ken Martin

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Advertising / nabip-tx.org
https://nabip-tx.org/Media_Sponsorships

Graphic Design / Ron Byrd
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NABIP-TX News 2024 Advertising Rates

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EDITOR

The Phoenix Is Flying High

RON BYRD
President
Group & Marketing Division
The Infinitus Group

Some NABIP-TX chapters, like the Phoenix, didn't rise from the ashes but certainly soared from the flames.

While recent state board meetings focused on merging chapters that struggled due to a lack of volunteer board members, the NABIP-TX June 2024 board meeting showcased the Phoenix flying high.

Several state chapters experienced great attendance at their annual symposiums but faced challenges in filling board positions. This issue affected both small and large chapters, prompting the state board to ponder solutions for months.

Mergers seemed inevitable, though undesirable, as it would require members to travel long distances for chapter functions.

Then, the Phoenix began to soar.

Thanks to the dedication of some remaining local chapter board members, who doubled down on their efforts and made the necessary calls, membership responded enthusiastically, and board positions were filled.

NABIP-East Texas President Gene Bentley reported an expected attendance of 200 at their upcoming symposium and their board is strong.

NABIP-San Antonio's annual symposium always draws a full house, and their board is nearly at full capacity.

NABIP-SOTX anticipates another full house at their fall symposium, with the board committed to staying on until local member and current NABIP-TX incoming secretary, Pete Jaramillo, completes his State Presidency in 2030.

As for NABIP-TX, life is good. The state chapter is Texas proud and on the move.

Just as doctors and lawyers are considered professionals and belong to their respective associations to better serve their clients, so should professionals in the benefits industry. If you consider yourself a professional in this field, now is the time to join NABIP-TX.

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President Message - Michael Ledgerwood

Michael Ledgerwood
Senior Health Plans of Texas

As my term as President comes to a close, I wanted to take a moment to express my heartfelt gratitude to each and every one of you. This year has been incredibly rewarding, and I am proud of what we have accomplished together.

One of the highlights of my term was seeing our membership grow. This growth is a testament to the strength and dedication of our organization and the value we provide to our members. Your engagement and enthusiasm have been truly inspiring.

We also celebrated another successful state convention, which provided us with valuable opportunities to learn, network, and advance our profession. The energy and commitment displayed at the convention were nothing short of remarkable.

This year, we held our first-ever virtual Day at the Capitol, and it was a tremendous success. Despite the challenges of a virtual format, we were able to connect, advocate, and make our voices heard. It was a historic moment for NABIP-TX, and I am grateful for everyone's participation and support.

One of the most rewarding aspects of my presidency was the chance to meet so many of you at local chapter events. Your hospitality and passion for our mission were evident in every interaction. These experiences have reinforced my belief in the power of our community and the important work we do.

Thank you for the honor of serving as your President. I am confident that NABIP-TX will continue to thrive and make a positive impact in the years to come. I look forward to staying involved and supporting our organization in new ways.

With gratitude and best wishes,

Michael Ledgerwood

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MERONEY MEMO / 2024 Primary Election Results

LEGISLATIVE NEWS

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Texas House Speaker Dade Phelan (R-Beaumont) emerged with a very narrow victory in last month's Primary Runoff election over a well-funded challenger endorsed by former President Donald Trump and his allies. By just 366 votes (50.7-49.3%), Phelan defeated former Orange County Republican Party chairman David Covey, who also had the backing of Lt. Gov. Dan Patrick, Attorney General Ken Paxton and former Texas Republican Party Chairman Matt Rinaldi.

Phelan avoided becoming the first House speaker to lose a Primary election in 52 years. Covey called Phelan an "Austin swamp creature" who only secured reelection through the support of Democrats, which he said was a "brazen act of betrayal." Paxton said the speaker had "blatantly stolen an election from the hard-working people of his district" by courting Democrats. Paxton said Republicans should move to closed primaries — a priority of the far right — and he issued a warning to members of the House: "To those considering supporting Dade Phelan as Speaker in 2025, ask your 15 colleagues who lost re-election how they feel about their decision now," Paxton said. "You will not return if you vote for Dade Phelan again."

On the morning of runoff, newly elected Texas GOP Chair Abraham George called for an end to the Republican civil war. "Let's all come together and row in the same direction," he said, urging the warring factions of the party to "focus on defeating Democrats" once the primaries were over. For George and his far-right allies, the call was contingent on Phelan losing his Runoff that evening, allowing Republicans to coalesce behind an even more conservative leader who would run the chamber by rejecting bipartisan compromise. Instead, Phelan eked out a win in his Southeast Texas district and vowed to keep control of the gavel next year — and the facade of unity dissolved.

Phelan has been a lightning rod for the GOP's ultraconservative wing since he backed Paxton's impeachment on corruption and bribery charges last spring. The hard right, led by Paxton and Lt. Gov. Patrick, accused Phelan of ceding too much power to Democrats and went all out trying to oust him and his allies in the primary. In the end, neither of the dueling GOP factions landed a clean knockout blow — instead they both emerged from the rubble of the rough primary season injured and emboldened, and their grudges calcified.

To be elected Speaker, a House member must secure 76 votes, a majority of the 150-seat chamber. Democrats currently control 64 seats, meaning a Speaker hopeful could theoretically win with full Democratic support and around a dozen of the 86 Republicans. This is how former Speaker Joe Straus emerged in 2009 to win the gavel over incumbent Speaker Tom Craddick. To prevent this scenario, Phelan's rivals have called for Speaker candidates to only solicit support from Republican members.

Besides Phelan's HD 21 race, a wave of Republican incumbents were swept out of the Texas House in the primary and runoff elections. Six of the eight GOP House members who were forced into overtime lost their runoffs, continuing a surge of anti-establishment energy that had already led to the ouster of nine House Republicans in the March primary. The only other incumbent to survive was Rep. Gary VanDeaver (R, HD 1) in Northeast Texas, who defeated challenger Chris Spencer (53.5-46.5%).

Incumbents who lost include:

- Rep. Justin Holland (R, HD 33) defeated by Katrina Pierson (43.6-56.4%)
- Rep. John Kuempel (R, HD 44) defeated by former Rep. Alan Schoolcraft (44.5-55.5%)
- Rep. DeWayne Burns (R, HD 58) defeated by Helen Kerwin (42.5-57.5%)
- Rep. Frederick Frazier (R, HD 61) defeated by Keresa Richardson (32.4-67.6%)
- Rep. Lynn Stucky (R, HD 64) defeated by Andy Hopper (41.9-58.1%)
- Rep. Stephanie Klick (R, HD 91) defeated by David Lowe (43.4-56.6%)
- Rep. Shawn Thierry (D, HD 146) defeated by Lauren Ashley Simmons (35.4-64.6%)

(continued on page 16)

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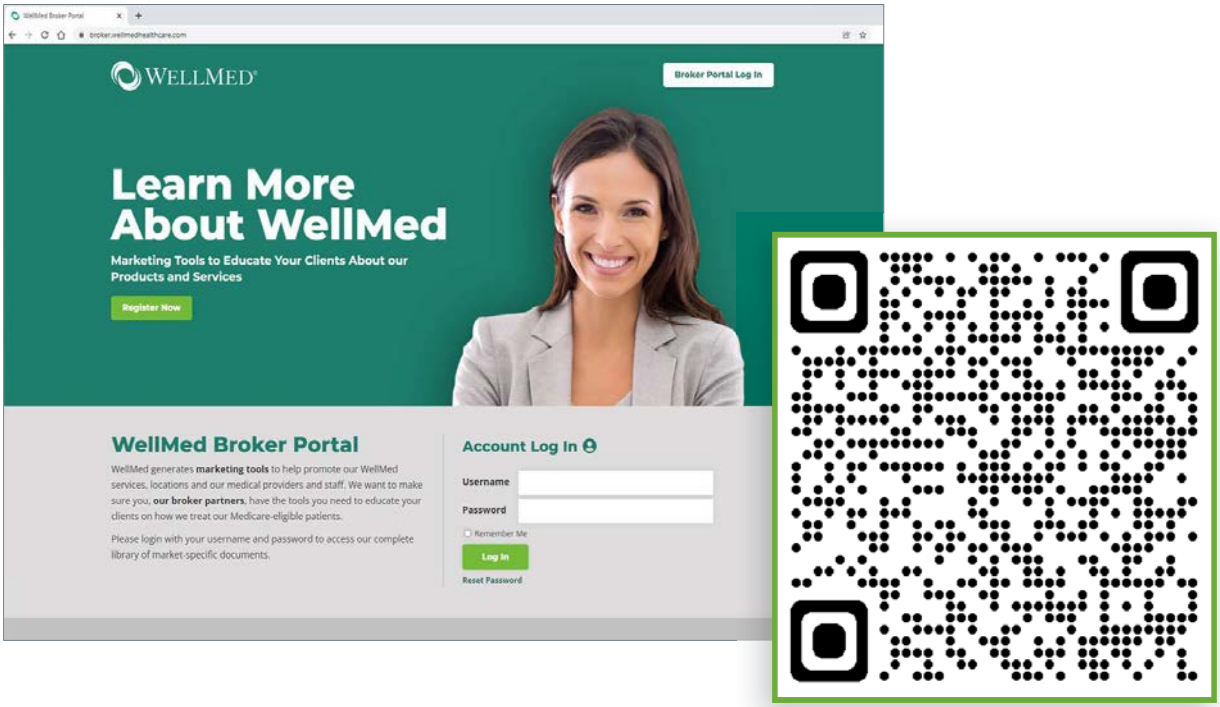

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Meet NABIP-TX New President Stacy Cochran

By Editor, Ron Byrd

Please join me in extending a warm welcome to Stacy Cochran, our new president at NABIP-TX. Stacy brings a wealth of expertise as she has been in the Third Party Administrators field for most of her professional career. With over 30 years in the industry, Stacy possesses extensive knowledge of administration work for group benefit plans.

Beyond her professional achievements, Stacy is actively involved in the National Association of Benefits and Insurance Professionals - Fort Worth (NABIP-FW), having served in various positions and as president. Get to know Stacy in her own words.

Could you share with us a bit about your early life, upbringing, and any experiences that shaped your values and aspirations?

Even though I was born in Louisiana, I got to East Texas as soon as I could, arriving in the Lone Star State at six months of age. I am an only child and was very much a tomboy growing up. My parents, particularly my dad, empowered me to try anything I thought I could handle. Horses and motorcycles were always a passion, and I got my Harley at fifteen. Because my parents never told me that I couldn't do something because I was a girl, that really shaped my outlook on life. If I hit a wall, I just look for a way around it.

Family often plays a significant role in shaping our lives. How has your family influenced your journey, particularly in your career and leadership aspirations?

I was taught that if you do a task or job, do it to the best of your ability, doing it halfway is not an option. That advice has served me well in my career.

What initially drew you to the insurance industry, and what aspects of it do you find most rewarding or fascinating?

I would love to share an aspirational story about how I was a little girl and dreamed of one day working in a TPA but alas, that would be a fairytale. I moved to the Metroplex in 1988 with my two best friends, a guy and a girl, and was working at a dealership. I met my soon-to-be husband there and decided I needed to find another job. A friend of mine was working at Transport Life Insurance in downtown Fort Worth, she got me an interview for a mailroom position.

The rest, we can say, is history. I worked hard and was extremely lucky to have many female mentors who were willing to share their knowledge with me so that I could grow and flourish. I have done almost every job in the TPA world and use that knowledge in my current position to motivate my team. I will never ask them to do a task that I would not do myself. Empowering my team to learn and expand their knowledge base so that if they want to advance, they have the tools to do so.

Many people are curious about what motivated you to join our association. Could you tell us about the factors that led you to become a member?

For an eighteen-month period around 2000, I ventured into the broker's side and while working at a Fort Worth brokerage, they took me to my first FWAHU (because it was at that time) meeting. I didn't officially join until 2004. I was very intrigued at the lack of competition between members in the same market segments. The people hooked me, I drank the Kool aid!

Joining the board of directors is a significant commitment. What inspired you to take on this leadership role within our association?

I had served in the FW chapter as President and on the state board in membership positions. At a PAC event, Mark Bellman came up to me and told me that I really should consider serving on the Texas EC board. Honestly, I didn't see

it, but I trusted Mark and started thinking seriously about serving in a different way. I really believe in our Association and wanted to give back as much as it had given me.

Could you share some of your key goals or visions for the association during your tenure as president?

Membership, membership, membership! We have got to evolve and grow, we cannot continue to do the same old things and expect different results.

As someone who has climbed the ranks within our industry and association, what advice would you give to aspiring professionals looking to make a similar impact?

Align yourself with like minded people and don't be afraid to ask for help. I have been very blessed to have great mentors in my career and the Association.

Do you have any personal mottos or guiding principles that have helped shape your approach to leadership and life?

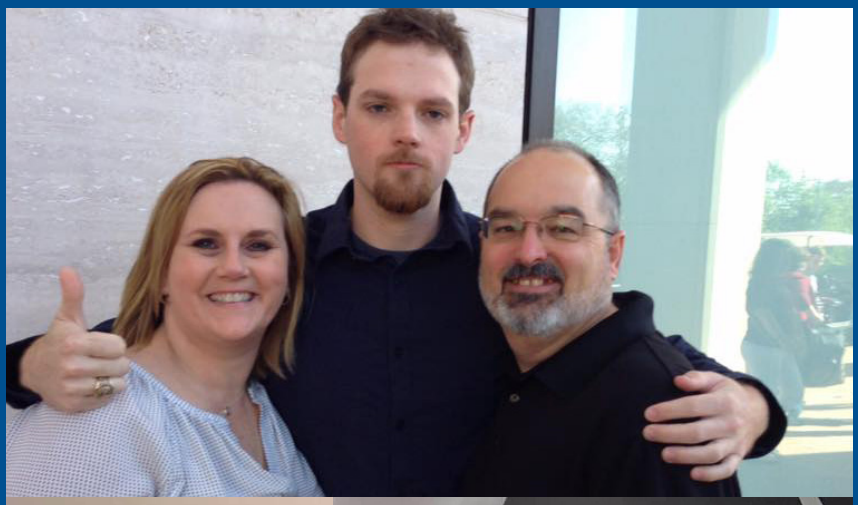
Find the smartest people you know and aspire to be at their level. I have learned so much from really listening to people share their thoughts and ideas and even if we do not agree, I try to take some nugget from the situation and learn from it.

Balancing work and personal life can be challenging, especially in leadership roles. How do you manage this balance, and what strategies do you find most effective?

It is easier for me than most people as my child is grown and happily married. My paying gig does require a lot of work hours and I am blessed to say that I love my job. I've been called a workaholic for years; I prefer to say that I don't have a job, but a way of life. I am striving to have more of a work / life balance but, don't know if I can change my ways….lol!

Finally, what legacy do you hope to leave behind as president of our association, and what impact do you aspire to have on the industry and its members?

The sense of volunteerism that our members have dedicated to this association over the years is astounding, they have freely given their time to make us better. That legacy has inspired me to serve this association with a true servant's heart and to try to emulate those who have come before me.
Our association has given me so much personally, my hope is that I will be remembered as someone who truly cared.



NABIP - TX 2024 Annual Conference

NABIP-TX hosted its annual state convention on April 15 & 16, 2024, at the Westin in Irving Las Colinas, welcoming a full house of vendors and attendees.

The theme for this year's convention, "Laugh, Learn and Lead," was chosen by Convention Chair and newly appointed President, Stacy Cochran of the NABIP-FW chapter.

Day 1: April 15th

The convention kicked off on Monday with a Medicare-focused session coordinated and emceed by Dana Lasman, Texas Medicare Chair featuring:

- "How to Build a Team" with Rebecca Davis and Danielle Kunkle-Roberts
- "Understanding Loss Ratio, Data, and Number of Insured within a Carrier's Book of Business" by Terry Warner
- "Senior Dental Plans – Data That Will Blow Your Mind" by Craig Taylor
- "The Art of Cross Selling – How to Hold onto Your Book of Business" by Gaylan Hendricks and Nicole Morgan

A Legislative luncheon followed, hosted by NABIP-TX Lobbyists Shannon and Mike Meroney, featuring Keynote Speaker, State Senator Nathan Johnson. The luncheon, free for NABIP-TX PAC contributors, saw Senator Johnson discussing the cost benefits of Medicaid expansion and the high costs associated with underinsurance, emphasizing the impact on emergency room visits and long-term hospital stays.

The convention's official opening session began at 1:00 PM with the annual membership meeting and the installation of NABIP-TX 2024-25 officers, officiated by Past President Kelly Fristoe. "Medicare Matters," hosted by Mike Smith and Josh Slatter, provided an overview of the NABIP Capitol Conference held earlier in 2024, followed by "The State of Politics Today," with Shannon and Mike Meroney.

The first Continuing Education (CE) class presented by Dana Lasman, featured a membership panel with Carla Adams, Danielle Kunkle Roberts, Mike Smith, and Audra Sullivan discussing the "Do's and Don'ts of Coordination Group Benefits and Medicare." The session concluded with a keynote address, "Yes, And..." by David Wilk from Four Day Weekend.

The evening wrapped up with a welcome reception in

the exhibit hall, followed by a comedy night featuring the Dallas Comedy Club Improv Players, where members participated in skits, filling the room with laughter.

Day 2: April 16th

The second day began with a Medicare General Session, including two CE classes hosted by Danielle Kunkle Roberts and Norma Johnson on "2025 Marketing Rules and CMS Regulations" and "Deep Dive into Medicare Part D."

Additional sessions included:

- "Understanding the Social Media Platforms" by JoAnna Barker
- "The Ins and Outs of an FMO Relationship" by Greg Segovia III
- "Navigating the Escalation Path with Your Carriers – Who to Ask What" by Sydney Schoellman
- "Succession Planning" by Emily Trevino

The Continuing Education Breakouts offered six opportunities for members to earn CE credits or enhance their industry knowledge:

- "Why Benefits are Right when Money is Tight: Making the Link Between Employee Benefits and Employee Financial Wellness" by Becky Crutchfield
- "ERISA Conundrums and the Consequences of Piercing the ERISA Veil" by Carla Adams
- "Compliance Data Mining: Essential Compliance Elements and Broker Opportunities in Benefits Compliance" by Agnela Surra,
- "ICHRA Education & Lessons Learned" by Kyle Estep
- "ICHRA: Strategies – Opportunities – Profit" by James Douglas
- "Coffee Wisdom: Lessons from Brokers in Cars" by Reid Rasmussen

Following lunch with exhibitors, the afternoon General Session featured newly named NABIP CEO, Jessica Brooks-Woods, who provided updates on NABIP activities and events in Washington.

The day continued with three more sessions:

- "Industry Discussion" by 90 Degree Benefits and VSP
- "Weight Management Strategies – With and Without GLP-1s" hosted by Danielle Perrodin and Raj Shiwmangal
- "Empowering Businesses to Flourish in the Digital Landscape" by Bryan Acosta of Advent Trinity Marketing Agency

The event concluded with exhibitor raffles, prize giveaways, and the announcement of chapter awards during the Hollis Roberson Award dinner, honoring this year's recipient, Mark Bellmon, who will be featured in the Fall edition of the NABIP-TX magazine.

Special Thanks

A special thank you to all attendees and the convention committee:

- Convention Chair: Melanie York
- President: Michael Ledgerwood
- Texas Medicare Chair: Dana Lasman
- EC Chair: Stacy Cochran
- Legislative Chair: Angela Theesfeld
- Lobbyists: Shannon & Mike Meroney
- Executive Directors: Lisa Strug & Sarah Kovalakides
- Marketing & Sponsors: Ron Byrd
- Professional Development: Dee Eller
- Hollis Roberson: Rick Ott
- Emcee: Danielle Kunkle Roberts

The 2025 State Convention will be held at Moody Gardens in Galveston, TX, from April 8-10.

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NABIP- Lone Star

NABIP-TX PAC
Highest Chapter
NABIP- Dallas

NABIP-TX PAC Top
Members Percentage
NABIP- Lone Star

Mike Rivera Award
Top NABIP-TX PAC
Roland Barrera

CONVENTION IMAGES

(Continued From Page 8)

In other races:

- Trey Wharton beat Ben Bius to secure the GOP nomination for HD 12
- Jeff Barry beat Alex Kamkar to secure the GOP nomination for HD 29
- AJ Lauderback beat Jeff Bauknight to secure the GOP nomination for HD 30
- Jonathan Gracia beat Ruben Cortez, Jr. to secure the DEM nomination for HD 37
- Lea Simmons beat Summara Kanwal to secure the DEM nomination for HD 76
- Vince Perez beat Norma Chávez to secure the DEM nomination for HD 77
- Cecilia Castellano beat Rosie Cuellar to secure the DEM nomination for HD 80
- Carlos Walker beat Diane Symons to secure the DEM nomination for HD 97
- John McQueeney beat Cheryl Bean to secure the GOP nomination for HD 97
- Charlene Ward Johnson beat Angeanette Thibodeaux to secure the DEM nomination for HD 139

In the Texas Senate:

- Incumbent Sen. Molly Cook (D, SD 15) holds a VERY narrow lead (74 votes) over Rep. Jarvis Johnson in the runoff for the Democratic nomination. Cook beat Johnson in early May to win a special election to fill the unexpired term of John Whitmire. With 99% of votes counted, Cook leads Johnson with 9,428 to 9.354 votes (50.2% to 49.8%).
- Former Denton County GOP Chair Brent Hagenbuch won the Republican primary runoff to succeed retiring state Sen. Drew Springer. Hagenbuch (56.7%) defeated Jace Yarbrough (43.3%). Questions about Hagenbuch's residency and whether he could run in the district shadowed his primary campaign — and aren't resolved yet. The third-place primary candidate Carrie De Moor, later joined by Yarbrough, sued Hagenbuch, arguing that his primary residence was in neighboring Senate District 12 rather than the office building listed in his SD 30 campaign filings. If Hagenbuch is declared ineligible by a court before late August, he could lose his place on the ballot. A GOP executive committee, likely precinct chairs in the district, would then elect a replacement candidate.

It was a cutthroat primary and runoff season even by Texas' standards, defined by relentless attacks on candidates' integrity and distortions of their voting records, all amplified by historic levels of campaign ad spending. And it only seemed to lay the groundwork for more chaos and strife, with no clear end in sight. Buckle up.

When You Catch A Glimpose Of Your Potential, That's When Passion is Born!

- Zig Ziglar

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Kylie	Everhart		TXAUSTIN	MacKenzie	Culp	Empower Brokerage Inc	TXFORTWORTH
Dana	Ewing	Devoted Health	TXAUSTIN	Elaine	Enis	Elaine Enis Insurance	TXFORTWORTH
Anna	Harris	Harris Insurance Services	TXAUSTIN	Kenneth	Lammons	Patriot Retirement Group LLC	TXFORTWORTH
Robin	Johnston	NFP	TXAUSTIN	Armando	Luna	CVS Health, INC	TXFORTWORTH
Ernesto	Martinez	Texas Association of Counties	TXAUSTIN	Daniel	Moughon	The Brokerage, Inc. - FMO Promo 2024	TXFORTWORTH
Neil	McNeill	Tokio Marine HCC-Supplemental Heath	TXAUSTIN	Kevin	Neuse	Free Market Administrators LLC	TXFORTWORTH
Alyssa	Morgan	Frost Insurance	TXAUSTIN	Krista	Palmer		TXFORTWORTH
Samuel	Nortch	BKCW	TXAUSTIN	Lindsay	Rossi	Higginbotham Ins Agency, Inc.	TXFORTWORTH
Kevin	Opgenorth	Patient Choice Management LLC	TXAUSTIN	Coral	Snow-Fergus	Leaf Health	TXFORTWORTH
Leslie	Roan	Roan-Nelson & Associates	TXAUSTIN	Jose	Suarez		TXFORTWORTH
David	Rodriguez	The Nitsche Group	TXAUSTIN	Miguel	Torres	Agency4RED	TXFORTWORTH
Roger	Sanchez	Nonstop Health - 5% Discount	TXAUSTIN	Suha	Ahmad	S. O. S. Financial Solutions, LLC	TXHOUSTON
Susan	Spence		TXAUSTIN	Melissa	Bowers	BenefitMall	TXHOUSTON
Robin	Trousdale	Advocate Health Advisors	TXAUSTIN	Bradley	Brawner	Advocate Health Advisors	TXHOUSTON
Robert	Wong	BenefitMall	TXAUSTIN	Storey	Budzinski	Equitable	TXHOUSTON
Leo	Barrera	Associated Marketing Group	TXCOASTLBND	Victoria	Crocker	The Crocker Group	TXHOUSTON
Alyssa	Bueno	GSM Insurors	TXCOASTLBND	Breia	Foston	Worldview Benefit Advisors, Inc.	TXHOUSTON
Amy	Cruz	GSM Insurors	TXCOASTLBND	James	Hendon	Agility Insurance Services	TXHOUSTON
Jessica	Harman	Insure Me Shop	TXCOASTLBND	Alan	Holland	Princpal Financial Group	TXHOUSTON
Kimberly	Marquis	GSM Insurors	TXCOASTLBND	Vanessa	La Barrie	Keystone Advisors LLC	TXHOUSTON
Rick	Ott	Rick Ott & Co. Insurance	TXCOASTLBND	Odos	Long	Business Workers of America	TXHOUSTON
Sergio	Andrade	Stagecoach Insurance Services	TXDALLAS	Jessica	Lopez	Agility Insurance Agency	TXHOUSTON
Tiffiney	Barlow	Next Level Insurance Agency, LLC	TXDALLAS	Andrew	Pertl	The OccuNet Company	TXHOUSTON
Jennifer	Blumberg	Blumberg Benefits LLC	TXDALLAS	Zack	Simpson	Health In Tech	TXHOUSTON
Laura	Booty	LB Health Insurance Solutions	TXDALLAS	Andrew	Smith	INSURICA	TXHOUSTON
Cassandra	Conley	Shandro Group	TXDALLAS	Ruben	Trejo	Life & Health Hub	TXHOUSTON
Julie	Crosby	Insgroup LLC dba K & S Insurance	TXDALLAS	Emily	Yamada	Tandem HR	TXHOUSTON
Renee	Elsner	Renee Cares LLC	TXDALLAS	Amanda	Clayton	INSURICA	TXLONESTAR
Sheridan	Freeman	Evry Health	TXDALLAS	Annie	Kelley	Upshaw Insurance Agency	TXLONESTAR
Angela	Glover	H G Tailored Financial Services LLC	TXDALLAS	Kathy	Davenport	Texas Association of Counties	TXSANANGELO
Brant	Green	TexCap Insurance Services	TXDALLAS	Bryan	Anderson	Anderson Risk Solutions	TXSANANTONIO
Hollie	Harris	Next Level Insurance Agency, LLC	TXDALLAS	Vanessa	Carrasco	TPB Insurance Group Inc	TXSANANTONIO
Amel	Hashim		TXDALLAS	Carolina	Cisneros	Molina Healthcare	TXSANANTONIO
Jared	Hewitt	Frost Insurance	TXDALLAS	Claudia	Diaz	The Brokerage, Inc.	TXSANANTONIO
Sierra	Hill	Next Level Insurance Agency, LLC	TXDALLAS	ADRIANA	Freeman	Insure Prosperity Llc	TXSANANTONIO
Kelsey	Korpal	Next Level Insurance Agency, LLC	TXDALLAS	Richard	Lopez	PES Benefits	TXSANANTONIO
Mary	Letney	TexCap Insurance Services	TXDALLAS	Trinidad	Parada	Future Concepts Gonzales Insurance	TXSANANTONIO
Cassidy	Lutosky	Imagine360	TXDALLAS	Kimberly	Rodriguez	Coverage2Care	TXSANANTONIO
Michael	Masse'		TXDALLAS	Lilly	Sanchez	APS Payroll	TXSANANTONIO
Michelle	McLaren	The Brokerage Inc	TXDALLAS	Shelly	Solorzano	Hidden Canyon Health Benefits	TXSANANTONIO
Ashley	Mihelich	Next Level Insurance Agency, LLC	TXDALLAS	Scott	Stevenson	Foundation Risk Partners, Corp	TXSANANTONIO
Brett	Newman	ACAP Health Consulting, LLC	TXDALLAS	Kylie	Wise	Principal Financial Group	TXSANANTONIO
Fernando	Quirarte	Christus Health	TXDALLAS	Silvia	Avila	Infinitus Marketing Alliance, LLC	TXSOUTH
Marisol	Rizo	Next Level Insurance Agency, LLC	TXDALLAS	Iris	Castillo	Arch Brokerage	TXSOUTH
Harrison	Schulman	Aetna	TXDALLAS	Michael	De La Rosa	Aflac	TXSOUTH
Brian	Strother	EyeMed	TXDALLAS	Diana	De Leon	Pete Jarmarillo Insurance Services	TXSOUTH
Ben	Swann	MarshBerry & Co.	TXDALLAS	Lora Lynn	Diaz	Infinitas	TXSOUTH
Beth	Toler	Next Level Insurance Agency, LLC	TXDALLAS	Guadalupe	GOMEZ		TXSOUTH
Collette	Williams	Blue Cross Blue Shield of Texas	TXDALLAS	Carmen	Pedraza Silva		TXSOUTH
Lisa	Henderson	Customized Employee Benefit Plans of East Texas, Inc.	TXEAST	Kassandra	Silva	Pete Jarmarillo Insurance Services	TXSOUTH
Keith	Hilliard	Worth Planning Group	TXEAST	Nereida	Vasguez	Infinitus	TXSOUTH
Jennifer	Hughes	Customized Employee Benefit Plans of East Texas, Inc.	TXEAST				

The NABIP – National Association of Benefits & Insurance Professionals held its Annual Convention starting on June 21st in Chicago, IL, with attendance significantly surpassing previous years.

The convention was emceed by Texas's own Reid and Heidi Rassmussen with the Star-Spangled Banner was sung by NABIP CEO Jessica Brooks-Woods daughter.

On Friday the 21st, the Board of Trustees held their annual meeting, followed by Regions 3 and 5 Leadership meetings on June 22nd.

NABIP CEO Jessica Brooks-Woods, President Eric Kohlsdorf, and President-Elect Alycia Riedl hosted a First-Timers Orientation gathering before the Welcome Reception with sponsors and exhibitors. The evening's kickoff party was held at Howl at the Moon Dueling Piano Bar, included with attendees' registration.

The General Session opened on Sunday with keynote speaker Dethra Giles, who spoke about "Reimagining Your Journey to Success."

Dethra, a career optimizer who advises organizations and individuals on how to chart their paths to success, discussed success formulas starting with Values, Accountability, Communication, Conflict Management, and Repeat, Rest, Represent.

She referenced the African proverb, "If you want to go fast, go alone. If you want to go far, go together."

She also spoke about communication in the workplace and how to engage with others who see things differently, emphasizing the importance of admitting similarities before arguing with integrity if disagreements arise. The awards ceremony followed the general session, and the LPRT hosted its event at Harry Caray's to close out the night.

On Monday, breakfast with sponsors was followed by the day's General Session, featuring speakers Hugh O'Toole and Lester Morales. They discussed "Empowering Employees through Health Equity Plan Design" and "Health Benefits with a PURPOSE; Structuring Health Plans so Everyone Wins."

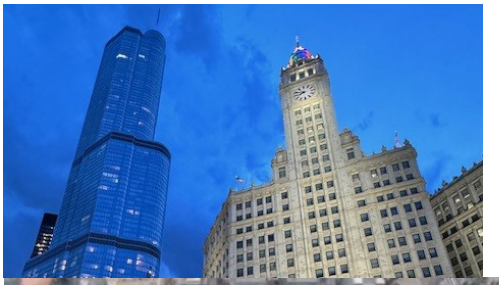
Regional meetings ensued, with Region 6, including Texas, having one of the largest groups of attendees, including many first-timers.

The afternoon included 14 breakout sessions and concluded with the Great Gatsby-themed Gordon Dinner.

The last General Session on Tuesday morning featured a panel discussion on "What's the REAL Cost of RX? And How Do We Fix It?" Panelists included Ali Goodwin from TrueScripts, Amanda Brewton from Medicare Answers Now, Cheryl Larson from the Midwest Business Group on Health, Bob Pfeiffer from ScriptSourcing, and Bill Hepscher from RXManage, moderated by President Eric Kohlsdorf.

The conference concluded with the House of Delegates/Voting/Swearing in of the 2024/2025 Board. With no major voting issues on the agenda, the convention closed ahead of schedule.

Next year's convention will be held in Miami, Florida, from June 28th to July 1st.



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accepted—no need to stop
and buy fare

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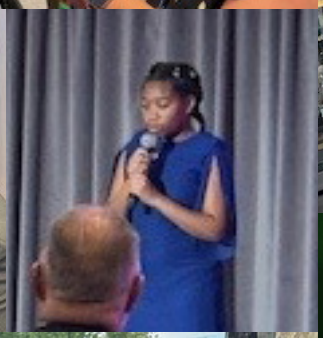

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CHICAGO

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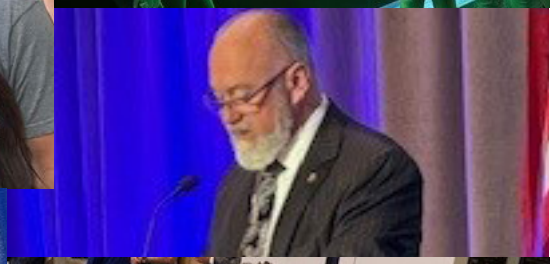

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PAC / Legislative Fund Contribution Form

Two Ways to Contribute:

NABIP-TX Political Action Committee (NABIP-TX PAC): Fund designated to contribute to state legislators.

Legislative Fund (Leg Fund): Fund to defray costs of legislative activities.

Contribution Levels:

☐ Diamond $1,200 ($100/Month)
☐ Ruby: $600 ($50/Month)
☐ Platinum: $300 ($25/Month)
☐ Gold: $150 ($12.50/ Month)
☐ Other: _____

Contribution Splits:

☐ 100% PAC
☐ 100% Legislative Fund
☐ 50% Each
☐ Other Split PAC _____ % Leg _____ %

Please note: Federal regulations prohibit corporate contributions to NABIP-TX PAC. Individual Contributions Only.
****Split contributions between PAC and the Leg Fund will be made in two separate charges each month in order to be in compliance with PAC contribution regulations.****

Who Are You?

Name _____ Local Chapter _____

Employer _____ Occupation _____

Address _____ City _____ Zip _____

Office _____ Cell _____ E-mail _____

Method of Contribution:

☐ **Bank Draft:** ***Preferred Method***

I authorize the National Association of Benefits and Insurance Professionals of Texas to initiate debit entries in the monthly amount _____per month charging my checking account as described on the accompanying voided check. This authorization is to remain in force until NABIP-TX has received written notification from me of its termination in such time and manner as to afford NABIP-TX and my depository reasonable opportunity to act upon it.

Signature _____ ***Please include a voided check.***

☐ **Credit Card: Must be at least $12.50/month or more**

Please charge my contribution **monthly** in the amount of $_____to my credit card.
Please charge my contribution **quarterly** in the amount of $_____to my credit card.
Please charge my contribution **one time** in the amount of $_____to my credit card.

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Card # _____ Exp. Date _____ VAL # (3-4 Digits) _____

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☐ **One Time Donation**

☐ I have attached a check payable to NABIP-TX PAC for the selected level (PAC)
☐ I have attached a check payable to NABIP-TX for the selected level (Leg Fund)

This authorization is to remain in force until NABIP-TX has received written notification from me of its termination.
I authorize Association Headquarters to charge my credit card as shown above.
I understand that the statement will read **"National Association of Benefits and Insurance Professionals of Texas"**.
I understand that this contribution is not tax deductible.

Mail To: NABIP-TX, 312 North Avenue East, #5, Cranford, NJ 07016 or fax to 908-967-5044 or e-mail to admin@nabip-tx.org. For questions, contact NABIP-TX HQ at 713-645-1490.

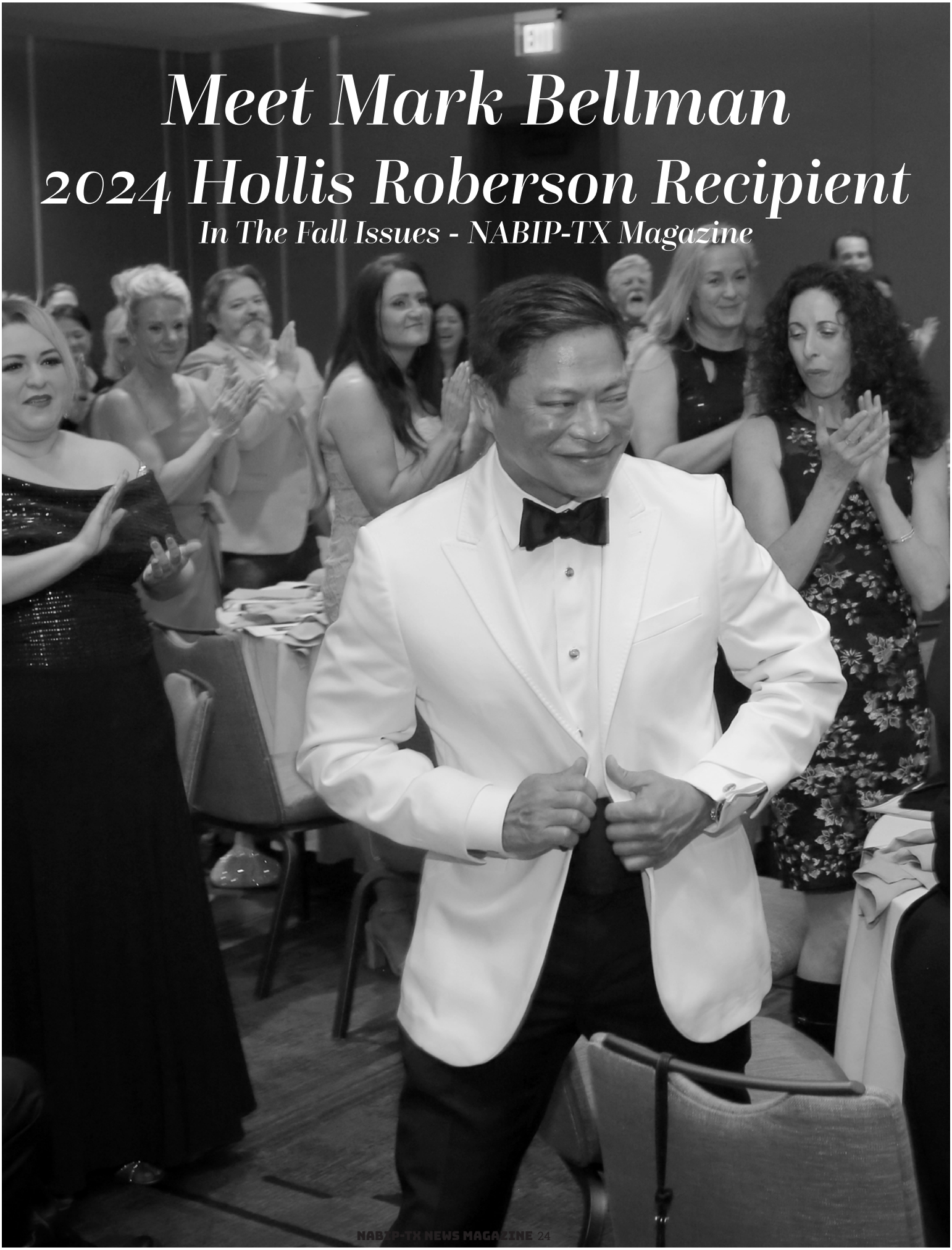
NABIP-TX PAC MEMBERS SUMMER 2024

WHERE DID YOU GO?

Member	Chapter	Level
Barrera, Rolando	Coastal Bend	Diamond
Booth, Tonya	Fort Worth	Diamond
Harrington Paula	South Texas	Diamond
Rivera, Michael	Houston	Diamond
Ashmore, Elizabeth	Lubbock	Ruby
Bellman, Mark	Austin	Ruby
Gingrich	Zach	Ruby
Harris, Polly	Coastal Bend	Ruby
Robinson, Judith	East TX	Ruby
Southan, Tamela	Dallas	Ruby
Alt, Sharon	Fort Worth	Platinum
Avery, Michael	Lone Star	Platinum
Avery, Wendy	Dallas	Platinum
Berry, Ernest	Lubbock	Platinum
Blair, Mary Ann	East TX	Platinum
Bolden, Michael	West Texas	Platinum
Brooks, Isha	Texoma	Platinum
Buffum, Ron	Austin	Platinum
Butler, Allison	Panhandle	Platinum
Cochran, Stacy	Fort Worth	Platinum
Cook, David	Texoma	Platinum
Cottar, Tom	Houston	Platinum
Debler, John	Coastal Bend	Platinum
DeLeon, Rachelle	N/M	Platinum
Fristoe, Kelly	Texoma	Platinum
Hayes Judith	West Texas	Platinum
Jaramillo, Pete	South Texas	Platinum
Johnson, Sandy	San Antonio	Platinum
Kelly, Renee	Austin	Platinum
Ledgerwood, Michael	Houston	Platinum
Lee, Susan	Houston	Platinum
Pleasants, Jennifer	Coastal Bend	Platinum
Rios-Carl, Elizabeth	El Paso	Platinum
Rolf, Rita	Dallas	Platinum
Scott, Nicole	San Antonio	Platinum
Smith, Mike	Fort Worth	Platinum
Splawn, W. Craig	Houston	Platinum
Trebing, C. Louanne	Dallas	Platinum
Walker, Kenneth	Austin	Platinum
Adams, Carla	San Antonio	Gold
Ahlquist, Neldia	Houston	Gold
Antongiovanni, Joanna	San Antonio	Gold

Member	Chapter	Level
Bentley, Beau	East Texas	Gold
Blankenship Dirk	Houston	Gold
Block Howard	Houston	Gold
Bradberry, Cherrie	Texoma	Gold
Burgess, Robbie	Coastal Bend	Gold
Burkholder Karen	Dallas	Gold
Byrd, Ron	South Texas	Gold
Castillo, Iris	South Texas	Gold
Christensen, Elizabeth	Fort Worth	Gold
Clingan, Nedra	San Antonio	Gold
DePaoli, Allison	San Antonio	Gold
Eilliott-Harmon, Patti	Coastal Bend	Gold
Eller, Darla	LoneStar	Gold
Ellis, Tom	El Paso	Gold
Evans, Mike	Lubbock	Gold
Ferfuson Kathy	San Antonio	Gold
Ford, Holley	Austin	Gold
Gilbert Debra	Dallas	Gold
Gonzales, Theresa	South Texas	Gold
Goodman, Cindy	Dallas	Gold
Grogan, Wayne	Fort Worth	Gold
Hamilton, Leawhine	Fort Worth	Gold
Hamm, Phillip	Houston	Gold
Hebert, Laura	Coastal Bend	Gold
Hoffman, Crystal	Houston	Gold
Holloway, Ryan	Fort Worth	Gold
Irwin, Maria	Austin	Gold
Jaques, Kevin	Austin	Gold
Keathley, Bryan	Fort Worth	Gold
Kirkhart, Taylor	Dallas	Gold
Knight, Jack	Panhandle	Gold
Lawlis, Rita	Lubbock	Gold
Leal, Gary	Houston	Gold
Lee, Diane	Coastal Bend	Gold
Long, Scott	Houston	Gold
Lopez, Melissa	San Antonio	Gold
Martin, Patricia	Houston	Gold
Meason, Toby	Panhandle	Gold
Miller, D'Ann	East TX	Gold
Naylor, Candice	Panhandle	Gold
Oliver Jamie	Houston	Gold

Member	Chapter	Level
Ott, Rick	Coastal Bend	Gold
Parkey, Sarah	Coastal Bend	Gold
Perryman, Melissa	Austin	Gold
Phifer, Joe	Dallas	Gold
Reynolds, Caleb	Austin	Gold
Richiuso, Christine	Dallas	Gold
Rivera, Marisa	South Texas	Gold
Roberts, Danielle	Fort Worth	Gold
Roosth, Michael	Houston	Gold
Salazar, Veronica	Houston	Gold
Sherman, Joe	East TX	Gold
Snyder, Stephen	Dallas	Gold
Stair, B. Gene	Austin	Gold
Stanley, Jennifer	Dallas	Gold
Stockstill, Beckie	Houston	Gold
Stubbs, Clifton	Fort Worth	Gold
Sullivan, Audra	Fort Worth	Gold
Swanson, Cynthia	East TX	Gold
Sypert, Steve	Lubbock	Gold
Theesfeld Angela	South Texas	Gold
Thorne, Roblyn	Austin	Gold
Trevino, Victoria	Austin	Gold
Vasquez Ramirez, Val	San Antonio	Gold
Wallace, Kasey	Houston	Gold
Wallin, Johnny	Fort Worth	Gold
Wild Trei	Dallas	Gold
Willingham, Sean	San Antonio	Gold
Young, Peter	Coastal Bend	Gold
Brattelli Wendy	East TX	Silver
Rasmussen, Reid	Austin	Silver
Diamond	$1,200 +	$100 Mo
Ruby	$600+	$50 Mo
Platinum	$300+	$25 Mo
Gold	$150+	$12.50 Mo
Silver	<$150	

Meet Mark Bellman
2024 Hollis Roberson Recipient

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