

NABIP-TX #32408		Update:	8/8/2026							
Active Course List			Let Course Expire							
			Pending approval/renewal							
			Renew?							
		Credit			Approved As	Approved As				
Course#	Course Name	Hours	Effective	Expiration	Classroom	Webinar	Approved Speaker(s)	Phone#	Email	EXPENSES = Travel Expense / CE Expense
146937	"Oldies" but "Goodies" Back to Basics Supplemental Group Health	1	3/12/2026	3/12/2027	Y	Y	Neil McNeill	205-388-5732	nmcneill@tmhcc.com	
142209	12 Months of Compliance for Group Health Plans	1	1/30/2025	1/30/2027	Y	Y	Cali Beeman	210-323-7846	cali@etctracking.com	
							Marcia Meyers	210-323-7846	marcia@etctracking.com	
							Heather Garcia	210-323-7846	heather@etctracking.com	
							Alicia Haff	210-323-7846	alicia@etctracking.com	
142097	3 Hours of Ethics?!	3	1/22/2025	1/22/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
142098	5500s. Set Me Straight.	1	1/22/2025	1/22/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
141622	ACA Penalty Enforcement-a Roadmap to the Plan and Reality	1	12/11/2024	12/11/2026	Y	Y	Heather Garcia	210-323-7846	heather@etctracking.com	
							Cali Beeman	210-323-7846	cali@etctracking.com	
							Elizabeth Raggio		elizabeth@eligibilitytrackingcalculators.com	
141623	ACA Penalty Enforcement Part 2-a Roadmap to the Plan and Reality	1	12/11/2024	12/11/2026	Y	Y	Heather Garcia	210-323-7846	heather@eligibilitytrackingcalculators.com	
							Cali Beeman	210-323-7846	cali@etctracking.com	
144482	Agency Evolution: Build Smart Scale Strategically, Exit Strong	1	8/11/2025	8/11/2027	Y	Y	Tim Kanter	805-273-7119	tkanter@inszoneins.com	
145934	Agents as Legislative Resources	1	12/23/2025	12/23/2027	Y	Y	Shannon Meroney		shannon@meroneypublicaffairs.com	
148140	Ancillary Term Showdown	1	6/10/2026	6/10/2028	Y	Y	Nedra Clingan		nedra.clingan@gmail.com	
142892	Back to Basics: Section 125 Cafeteria Plans	2	3/24/2025	3/24/2027	Y	Y	Sharon Alt			
143910	Best Kept Secret in Small Group	1	6/17/2025	6/17/2027	Y	Y	James Rodriguez	512-524-2618	jrodriguez@texhealthct.org	
143124	Beyond Borders: Insurance for Global Employees	1	4/10/2025	4/10/2027	Y	Y	Breia Foston	281-755-1926	bfoston@worldvba.com	
147263	Beyond Rates: How Brokers Can Win the Dental & Vision Conversation	1	4/2/2026	4/2/2028	Y	Y	Latricia Smith	214-724-7839	latricia.smith@solsticebenefits.com	
142482	Breaking Down Benefits Compliance: What Brokers Need to Know	1	2/20/2025	2/20/2027	Y	Y	Angela Surra, CISR, CI	814-594-6767	angela.surra@trustmineral.com	
148835	Brokers Unfiltered: Lessons from Brokers in Cars	1	8/6/2026	8/6/2028	Y	Y	Reid Rasmussen		reid@freshbenies.com	
141062	Can You REALLY DO that with an HRA?	1	10/14/2024	10/14/2026	Y	Y	Carla Adams	210-710-1280	carla@kyra.health	
142770	Cautionary Tales: The Pitfalls of Coloring Outside the Lines	1	3/13/2025	3/13/2027	Y	Y	Carla Adams	210-710-1280	carla@kyra.health	
142767	Charting the Course: Coordinating Group, Individual, and Medical	1	3/13/2025	3/13/2027	Y	Y	Dana Lasman			
148307	CMS CY 2027 Final Rule	1	6/24/2026	6/24/2028	Y	Y	William Pierce	573-381-0211	will.pierce@smsteam.net	
142099	COBRA-AM I Doing It Wrong	1	1/22/2025	1/22/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
142212	COBRA: Please Tell Me I'm Doing It Right?	2	1/30/2025	1/30/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
142100	Compliance Acronyms: Making Sense of the ABCs and 123s in Life	1	1/22/2025	1/22/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
148364	Compliance Strategies for Health, Life & Ancillary Benefits	1	7/8/2026	7/8/2028	Y	Y	Federico Guardia	800-998-7715		
							Greg Segovia III	800-998-7715	gsegovia@psmbrokerage.com	
147652	Coordinating Benefits: VA Benefits & Medicare	1	4/30/2026	4/30/2028	Y	Y	Ron Byrd	512-567-4181	ron@bnaia.us	
147654	Coverage Gaps in the Real Economy: Major Medical Limitations and	1	4/30/2026	4/30/2028	Y	Y	Ron Byrd	512-567-4181	ron@bnaia.us	
143017	CRM - Making Our Own Change	1	4/3/2025	4/3/2027	Y	Y	Clifton Stubbs	214-616-7511	cliff@rhythminsuranceagency.com	
							Jose "Pete" Jaramillo	956-580-1066	petejinsurance@msn.com	
147217	Deconstructing the 2026 Primary Election & Its Impact on Healthcare	1	3/31/2026	3/31/2028	Y	Y	Shannon Meroney		shannon@meroneypublicaffairs.com	
148836	Dental Plans Demystified	1	8/6/2026	8/6/2028	Y	Y	Jameson Keller	425-892-3397	jkeller@ncd.com	
143001	Direct Primary Care and How It's Used	1	4/1/2025	4/1/2027	Y	Y	Keith Kennington	210-415-6369	keith@HealthC2U.com	
146320	Discrimination Testing Demystified: ERISA, Section 125 & POP Coverage	1	1/29/2026	1/29/2028	Y	Y	2026 NABIP TX Convention			
142101	Don't Have an HSA? That is so 2003	1	1/22/2025	1/22/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
142213	DON'T Press Your Luck	1	1/30/2025	1/30/2027	Y	Y	Nedra Clingan		nedra.clingan@gmail.com	
142102	ERISA: Set Me Straight!	1	1/22/2025	1/22/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
142214	Ethics Jeopardy	3	1/30/2025	1/30/2027	Y	Y	Krista Palmer	214-600-9532	krista.palmer@gmail.com	
							Nedra Clingan		nedra.clingan@gmail.com	
142107	Ethics Jeopardy 2.0	2	1/22/2025	1/22/2027	Y	Y	Krista Palmer	214-600-9532	krista.palmer@gmail.com	
							Nedra Clingan		nedra.clingan@gmail.com	
141625	Ethics the NABIP Way 2hr	2	12/11/2024	12/11/2026	Y	Y	Jackie Spragins RHU	940-642-2780	jackies@wf.net	YES Travel Expenses APPRECIATED / No CE Fee
							Cheryl Clark	806-722-2402	cheryl.clark@umchealthsystem.com	YES Travel Expenses APPRECIATED / No CE Fee
							Audra Sullivan	817-228-6760	audra@vogueinsuranceagency.com	YES Travel Expenses / No CE Fee
							Reid Rasmussen	972-814-7887	reid@freshbenies.com	YES Travel Expenses / No CE Fee
							Rusty Rice	210-394-8103	rrice@avesis.com	No / No
							Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
							Denise S. Villagran	361-877-1133	denisev-indins@outlook.com	
							Cherrie Bradberry	940-322-6277	cbradberry@wf.net	
							Stacia Merriett	806-220-4204	staciam@upshaw-insurance.com	
							Tonya Booth	214-349-6067 x117	tonyaboottahu@gmail.com	
							Amy Perry, REBC	214-226-1451	amy.perry@emersonrogers.com	
141624	Ethics The NABIP Way 3 Hr	3	12/11/2024	12/11/2026	Y	Y	Neil McNeill	205-388-5732	nmcneill@tmhcc.com	
							Rusty Rice	210-394-8103	rrice@avesis.com	
							Neil McNeill	205-388-5732	nmcneill@tmhcc.com	
142215	Ethics the Yahoo Way	2	1/30/2025	1/30/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
144001	Ethics vs Morals, You Decide	1	6/27/2025	6/27/2027	Y	Y	Ron Byrd	512-567-4181	ron@bnaia.us	
							Audra Sullivan	817-228-6760	audra@vogueinsuranceagency.com	
140879	Explain AI to Clients (Before AI Does It For You)	1	9/18/2024	9/18/2026	Y	Y	Ali Panjwani	713-992-9956	ali@meritmedicine.com	
							Amit Jiwani	678-386-3874	amit@meritmedicine.com	
146615	Federal Legislative & Regulatory Update	1	2/19/2026	2/19/2028	Y	Y	Misty Baker		misty.baker@crcgroup.com	
142768	Federal Update and NABIP Federal Priorities	1	3/13/2025	3/13/2027	Y	Y	Max Karlin			

148694	Follow the Dollar: The Real Math Behind a Pharmacy Spend that	1	7/29/2026	7/29/2028	Y	N (Need Prior Approval)	Panel - Rachel Strauss		rachel@rachelmstrauss.com	
147498	From GLP-1s to Biosimilars: The Forces Reshaping Pharmacy S	1	4/20/2026	4/20/2028	Y	Y	Kyle Johnson	612-387-5434	kyle.johnson@fairview.org	
148691	From Passenger to Pilot: A Captive Conversation	1	7/29/2026	7/29/2028	Y	Y	Holley Ford	512-994-8225	hford@captiveresources.com	
147419	From Perfect Storm to Plan Reality - When the Headline Become	1	4/15/2026	4/15/2028	Y	Y	Cody Field	877-846-3397	cfield@lucyrx.com	
144261	HEALTH CARE HAPPENINGS – 2025 TX LEGISLATIVE SESSI	1	7/22/2025	7/22/2027	Y	Y	Shannon Meroney		shannon@meroneypublicaffairs.com	
142896	Health Care Hot Topics - 2025 TX Leg Mid-Session Update	1	3/24/2025	3/24/2027	Y	Y	Shannon Meroney		shannon@meroneypublicaffairs.com	
146938	Healthcare Isn't Broken - It's Working Exactly as Designed	1	3/12/2026	3/12/2028	Y	Y	2026 NABIP TX Convention			
143334	Hot Topics for ERISA Group Health Plan Sponsors	1	4/28/2025	4/28/2027	Y	Y	Troy Sisum	610-724-7357	tsisum@imagine360.com	
142103	I Want On! I Want Off! Is This a Qualifying Event?	1	1/22/2025	1/22/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
143363	ICHRA Basics	1	4/30/2025	4/30/2027	Y	Y	Mark Abare	469-842-0381	mark.abare@remodelhealth.com	
147653	ICHRA: A Practical Guide for Benefits Professionals	1	4/30/2026	4/30/2028	Y	Y	Carla Adams	210-710-1280	carla@kyra.health	
146936	ICHRA: How to Sell, Implement, and Avoid Pitfalls	1	3/12/2026	3/12/2028	Y	Y	2026 NABIP TX Convention			
147970	Introduction to Direct Primary Care	1	5/22/2026	5/22/2028	Y	Y	Courtney DeWitt		cdewitt@kerixhealth.com	
146847	Is There a Pill for that? PBM Legislation 2025-2026	1	3/16/2026	3/16/2028	Y	Y	Stacy Cochran		stacy.cochran@90degreebenefits.com	
143123	Legislative & Regulatory Update	1	4/10/2025	4/10/2027	Y	Y	Janet Trautwein	703-254-6019	janet.trautwein@warnerpacific.com	
146809	Lessons from Litigation: Navigating the Complex Intersection of L	1	3/5/2026	3/5/2028	Y	Y	Carla Adams		carla@kyra.health	
142104	Mayday! HRA, HSA, FSA, How to Tell Them Apart?	1	1/22/2025	1/22/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
142216	Medicaid and Children's Health Insurance Program (CHIP) Contir	1	1/30/2025	1/30/2027	Y	Y	Steve McLaughlin	866-590-9771	steve@enrollinsurance.com	
148695	Medical Tourism	1	7/29/2026	7/29/2028	Y	N (Need Prior Approval)	Panel - Naama Pozniak			
146731	Medicare - Beyond the Policy	1	2/27/2026	2/27/2028	Y	Y	Clifton Stubbs		cliff@rhythminsuranceagency.com	
143058	NABIP Power Hour: Insurance Superpowers Unmasked in an Ho	1	4/7/2025	4/7/2027	Y	Y	Scott Long	832-457-1472	scott.long@sotabenefits.com	
							Jennifer Pleasants	361-960-6891	jennifer_pleaseants@uhc.com	
142659	Navigating the Regulatory Seas: ERISA and Employee Benefit Co	1	3/5/2025	3/5/2027	Y	Y	Jessica Watts		jessica.watts@frost.com	
145307	OBBBA and 2025 Year End Compliance	1	10/15/2025	10/15/2027	Y	Y	Misty Baker		misty.baker@crcgroup.com	
147051	Payment Integrity & Fiduciary Duties	1	3/19/2026	3/19/2028	Y	Y	2026 NABIP TX Convention			
143015	Piecing it Together: The Puzzling World of Health & Medicare Pol	1	4/3/2025	4/3/2027	Y	Y	Chalen Jackson	573-283-8979	chalen.jackson@smsteam.net	
140781	Politics and Policy in Health Insurance: Preview of 2025	1	9/18/2024	9/18/2026	Y	Y	Shannon Meroney		shannon@meroneypublicaffairs.com	
146939	Professional Risk & Reputation: Compliance, Marketing and AI fo	1	3/12/2026	3/12/2028	Y	Y	2026 NABIP TX Convention			
148342	Protecting Futures: Complete Financial Strategy for Families	1	6/29/2026	6/29/2028	Y	Y	Ron Byrd	512-567-4181	ron@bnaia.us	
148326	RBP 101 Taking the Bill by the Horns	1	7/8/2026	7/8/2028	Y	Y	Joe Brining	405-615-6996	joe@iipartners.net	
148365	Rethinking Retention & Unit Economics in Medicare with AI	1	7/1/2026	7/1/2028	Y	Y	Naama Pozniak			
							Alex Doonanco			
144260	Retirement Planning with Life Insurance and Annuities	1	7/22/2025	7/22/2027	Y	Y	Robin Czarnek	210-892-0267	robinc@hermannsonslife.org	
141834	Self-funded Fundamentals	1	1/2/2025	1/2/2027	Y	Y	Jennifer Henry	713-614-4008	jennifer@boonchapman.com	
							Brock Mowery	717-951-3980	brock.mowery@boonchapman.com	
							Marcus Kammrath	219-608-9113	marcus.kammrath@boonchapman.com	
141836	Self Funding 102	1	1/2/2025	1/2/2027	Y	Y	Jennifer Henry	713-614-4008	jennifer@boonchapman.com	
							Brock Mowery	717-951-3980	brock.mowery@boonchapman.com	
							Marcus Kammrath	219-608-9113	marcus.kammrath@boonchapman.com	
147036	Staying in Sync: Understanding Medicare Coordination with Group	1	3/19/2026	3/19/2028	Y	Y	Panel - Jessica Watts		jessica.watts@frost.com	
							Dana Lasman		dana@medicatedana.com	
148824	Stop Asking AI Dumb Questions	1	8/6/2026	8/6/2028	Y	Y	Reid Rasmussen	972-814-7887	reid@freshbenies.com	
142105	Stop the Bleed Cost Containment Ideas	1	1/22/2025	1/22/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
142096	Striving for Compliance High-Level Overview of DOLs EBSA ERI	1	1/22/2025	1/22/2027	Y	Y	Heather Garcia	210-323-7846	alicia@etctracking.com	
							Cali Beeman		cali@etctracking.com	
							Maricia Meyer		maricia@etctracking.com	
144524	Tech for Insurance Agents	1	8/12/2025	8/12/2027	Y	Y	Victoria Cabrera		victoria@themedicarespace.com	
141835	The Artificial Intelligence Machine	1	1/2/2025	1/2/2027	Y	Y	David Slepak	480-747-1621	david@anglehealth.com	
147052	The Biggest Fumble in America	1	3/19/2026	3/19/2028	Y	Y	Darrell Moon	888-346-0990	darrell@orriant.com	
142106	The Case for HSAs in Transforming Healthcare	1	1/22/2025	1/22/2027	Y	Y	Gentry Lynn	817-454-9304	gentry.lynn@yahoo.com	
141063	The Dynamic Duo of Self-Funding	1	10/14/2024	10/14/2026	Y	Y	Emma Fox	503-703-1011	efox@epoweredbenefits.com	
							Tiffany Ryder	443-883-7365	tiffany@tiffanyryder.com	
140878	The Evolution of Benefits Continuation and Impact of COBRA	1	9/26/2024	9/26/2026	Y	Y	Carla Adams	210-710-1280	carla@kyra.health	
143836	The Underlying Cost of Accessing Healthcare	1	6/10/2025	6/10/2027	Y	Y	Joe Brining	405-615-6996	joe@iipartners.net	
							Ron Byrd	512-567-4181	ron@bnaia.us	
146017	Understanding ICHRAs: Insights, Adoptions & Trends for Insuran	1	1/6/2026	1/6/2028	Y	Y	Kylie Everhart		kylie@kyra.health	
148139	Understanding Metabolic Health: The Hidden Driver Behind Rising	1	6/10/2026	6/10/2028	Y	Y	Jeremy Meador	903-360-6849	Scott@TierOneBioOptimization.net	
143642	Understanding the FMO Relationship	1	5/23/2025	5/23/2027	Y	Y	Federico Guardia	800-998-7715	fguardia@psmbrokerage.com	
							Lucas Vandenberg	800-998-7715	lucas@psmbrokerage.com	
143016	Unlocking the Power of HSAs: Benefits, Compliance and Smart S	1	4/3/2025	4/3/2027	Y	Y	Carla Adams	210-710-1280	carla@kyra.health	
143014	Unmet Mental Health Needs: It's NOT Okay	1	4/3/2025	4/3/2027	Y	Y	Reid Rasmussen	972-814-7887	reid@freshbenies.com	
							Mandy Bowman		mandy@freshbenies.com	
141626	Vision Care Basics	1	12/30/2024	12/30/2026	Y	Y	Rusty Rice	210-394-8103	rrice@avesis.com	
							Doug Boyer		sboyer@avesis.com	
148310	What Every Broker Should Know About Ethics in Business	3	6/30/2026	6/30/2028	Y	Y	David Mordo	732-688-3595	mordode@gmail.com	
148825	What You Should Know in 2027 - Legislatively Speaking	1	8/6/2026	8/6/2028	Y	Y	Shannon Meroney		shannon@meroneypublicaffairs.com	
147499	Work Smarter, Not Harder: AI & Automation Strategies for the Me	1	4/20/2026	4/20/2028	Y	Y	David Domm	903-623-1695	service@omniaisystems.com	
NON NABIP TX CE PROVIDERS										
Types of CE			Company Name			Contact		Phone	Email	Website
Medicare, Life, DI			The Brokerage, Inc.			Mike Smith		469-635-6703	mike@thebrokerageinc.com	www.thebrokerageinc.com
Various			Comedy CE			Eric Johnson		817-366-7536	eric@comedyce.com	www.comedyce.com