

At the National Association of Benefits and Insurance Professionals (NABIP), we continue to amplify the collective voice of brokers, advisors, and consultants to strengthen and improve the healthcare system. Through strategic collaboration and a shared commitment to excellence, NABIP members—representing large firms, small businesses, individuals, and families—are at the forefront of discussions and solutions surrounding benefits management, employee retention, and healthcare costs.

Together, we are driving meaningful change.

This Q4 Quarterly Report highlights NABIP's impact across three key KPI's:

Operational Excellence – Strengthening internal processes and member engagement

Financial Vitality – Expanding resources and partnerships to ensure sustainability

Influence & Impact – Advancing advocacy efforts and increasing public awareness

As we close out 2024, NABIP remains steadfast in its mission to empower agents and brokers with the tools, knowledge, and advocacy necessary to serve consumers effectively. Our collective efforts this quarter have reinforced our leadership in the industry and set the stage for continued progress in 2025.

YOUR VOICE. YOUR IMPACT. YOUR NABIP.

As we close out 2024, I want to celebrate the incredible strides we've made together. From key legislative wins to enhancing our Medicare certification and strengthening industry partnerships, NABIP has remained laser-focused on delivering real value to you—our members.

Thanks to your support, we've:

- \cdot Reduced compliance burdens for employers
- Expanded agent and broker training
- \cdot Strengthened our influence in healthcare policy
- $\cdot\,\mbox{Amplified NABIP's reach and impact}$

Looking ahead to 2025, we remain committed to protecting your profession, amplifying your voice, and providing the tools you need to thrive. But NABIP's success starts with you.

Here's how you can take action:

• Stay Informed – Follow NABIP's newsletters and social media.

- Get Engaged Join advocacy efforts, trainings, or local events.
- Grow Your Influence Advance with NABIP's education programs.
- **Support the Cause** Strengthen NABIP's impact by contributing to NABIP PAC.

Take action today—recruit new members, share NABIP's advocacy, and help amplify the voice of agents and brokers. Visit brokersmakingadifference.org.



Thank you for your dedication—I'm proud to stand with you.

Jessica Brooks-Woods CEO, NABIP

Jessica L. Brooks

OPERATIONAL EXCELLENCE

PROFESSIONAL DEVELOPMENT & EDUCATION

LMS Launch: nabiptraining.org

NABIP launched its new Learning Management System (LMS), nabiptraining.org, offering a streamlined interface, interactive content, and enhanced CE credit tracking. This upgrade improves the student experience and reinforces NABIP's commitment to professional development.

Medicare Certification Growth

NABIP welcomed 2,060 new Medicare registrants in Q4, reflecting the value of its certification program and the success of outreach efforts, solidifying its leadership in Medicare training.

Expanding Partnerships and Outreach

New Partnerships: Finalized a collaboration with DC Health Link to host its Marketplace certification program, with efforts underway to create similar state partnerships.

Leadership Development: Partnered with educational providers to deliver training on fiduciary responsibilities, group, and individual sales growth.

Cybersecurity Taskforce: Board-approved initiative to address industry-specific cybersecurity needs, emphasizing NABIP's proactive leadership in this critical area.

MEMBERSHIP ·

NABIP continues to enhance membership services and engagement:

Database Migration: The new Member Database System launches in Q1 2025, starting with new enrollments, followed by renewals, Corporate Partners, and Agency Dues Model participants, ensuring a smooth transition.

2025 Agency Dues Model: Relaunching in February with a 3% average monthly increase, maintaining current categories with clear member guidance.

International Growth: NABIP welcomed Costa Rica Chamber of Commerce members into eight chapters, expanding global influence and promoting medical tourism.

BenefitPitch Partnership: A soft launch in eight chapters will introduce members to this innovative benefits platform, gathering feedback to enhance engagement.

Marketing Updates: Modernized materials will debut in early 2025 to strengthen outreach and member communication.

This quarter's efforts reflect NABIP's continued commitment to improving member experiences, expanding international influence, and leveraging innovative solutions to meet the evolving needs of our members.

FINANCIAL VITALITY

Strategic Partnerships



Renewals: Extended partnerships with Medicarians, BenefitsPRO, Nonstop Health, CalSurance, Lead Marvels and AgencyBloc.

Infrastructure & Technology Investments

Financial Commitment: Investing in critical infrastructure and technology upgrades across the organization.

INFLUENCE & IMPACT

GOVERNMENT RELATIONS & ADVOCACY

Legislation Passed: Employer Reporting

After years of advocacy, NABIP successfully secured updates to ACA employer reporting under Sections 6055 and 6056, reducing burdens and costs for businesses:

Simplified Reporting: Less documentation eases administration.

Dependent SSN Elimination: No longer required, improving privacy.

Extended Response Times: More time for large employers to address IRS notices.

Limited Lookback Period: Shorter IRS compliance checks reduce audit exposure.

This win provides significant relief, especially for small and mid-sized businesses, while ensuring ACA compliance.

Medicare Advocacy and Outreach

NABIP continues to champion Medicare beneficiaries and agents with these key Q4 initiatives:

AEP National Town Hall: A live virtual forum engaged members, addressed challenges, and gathered advocacy insights.

New Medicare Talking Points: Resources to help agents advocate for beneficiaries and highlight brokers' yearround value.

Survey Insights: Collected more than 10,000 responses from beneficiaries and agents showcasing brokers' essential role and policy impacts.

Key Meetings, Coalition Building and Legislative Advocacy

NABIP leadership advanced critical healthcare priorities through strategic meetings and coalition efforts:

Telehealth Advocacy: Collaborated with House leaders to push for telehealth reauthorization, with efforts continuing into the new session.

Medicare Policies: Engaged Senate Finance Committee staff to improve Medicare policies, leveraging agent insights to enhance beneficiary outcomes.

Direct Primary Care & HSAs: Advocated for aligning primary care models with HSA eligibility.

PBM Reform: Supported increased transparency and accountability in pharmacy benefit management.

Coalition Building: Strengthened partnerships with industry leaders to amplify advocacy efforts.

These initiatives highlight NABIP's commitment to advancing healthcare policy and delivering meaningful impact for members and the broader healthcare community.

INFLUENCE & IMPACT (CONTINUED)

STATE ADVOCACY UPDATE:

HB 2375, a NABIP-drafted model bill, advanced out of committee in Virginia. In partnership with Delegate Mark Sickles and the NABIP Virginia Chapter, the legislation increases transparency and accountability for pharmacy services administrative organizations (PSAOs) to help lower prescription drug costs and improve affordability, reinforcing NABIP's commitment to consumer-focused healthcare solutions.

NABIP PAC

NABIP's PAC continues to see strong support across all regions, reflecting members' commitment to advancing our advocacy efforts.

(R1) Total Donated: \$1,086.00 Donors: 14 (R2) Total Donated: \$6,432.00 Donors: 72 (R3) Total Donated: \$16,641.50 Donors: 128 (R4) Total Donated: \$12,557.50 Donors: 58
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(R4) Total Donated: \$12,557.50 Donors: 58
(R5) Total Donated: \$13,036.50 Donors: 103
(R6) Total Donated: \$14,286.26 Donors: 139
(R7) Total Donated: \$10,084.00 Donors: 79
(R8) Total Donated: \$17,598.50 Donors: 138

Total Contributions: \$91,722.26 Total Donors: 731

COMMUNICATIONS, PUBLIC RELATIONS AND MARKETING

Press Releases and Media Engagement

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Issued **10 press releases**, garnering **500+ press hits** – amplifying our advocacy and resources.



Publications and Content Creation

Published the Winter edition of bip Magazine in both print and digital formats, featuring a cover story on NABIP's PAC and its impact on healthcare policy.

Marketing Campaigns

Launched Brokers Making a Difference marketing campaign.





Promoted open enrollment media campaigns and chapter tools, enhancing member visibility and support during AEP and OEP.

Email and Social Media Metrics



Sent 67 all-member emails; average open rate of 32%, exceeding industry average.



Significant growth across social media platforms, with **400 new followers, 2,780 reactions, and 105,539 impressions in Q4.**

CONTACT US





