

AWARD INFORMATION

Description:

Harold R. Gordon is considered to be the father of the American health insurance industry. He was a visionary who sensed that some place between the property/casualty insurance and life insurance industry would emerge a distinct industry concerned with insuring the financial aspects of a person getting sick or hurt.

Harold Gordon was the first director of Health Insurance Association of America, which organized insurance companies to cooperate on matters of common interest. It was Harold Gordon who realized that agents too must organize for their common good. His vision and leadership resulted in the formation of the National Association of Health Underwriters (NAHU) which eventually became the National Association of Benefits & Insurance Professionals (NABIP).

In memory of this great leader and the legacy he has left, NABIP annually awards the industry's greatest accolade, the Harold R. Gordon Memorial Award, which recognizes a recipient for their lifetime achievement in the industry.

The recipient of the award is selected by a special committee that carefully reviews applications of industry professionals nominated for contributions made above and beyond the call of duty without a goal of personal gain.

Nomination Requirements:

To nominate someone for this award, please complete the following **Nomination Form**. Please include a statement of support for the nominated individual along with corroborating documentation detailing the accomplishments of the nominee. Provide information on present and former positions, including the individual's connections with health insurance, educational background and degrees, special honors and membership and positions held in other outside organizations. **Most importantly, please provide specific accomplishments that in your opinion entitle your nominee to this prestigious award.**

The deadline for applications is May 6, 2025.

NOMINATION FORM

Nominee's Name: _____

Nominee's Email Address & Phone Number:

Nominator's Name (Print): _____

Nominator's Signature: Ron ByrdNominator's Email Address & Phone Number:

Please make a copy for your records and email the application form and supporting documentation and testimonials to BWillson@NABIP.org. Electronic copies only, no hard copies will be accepted.

Rules:

1. This Nomination Form should be accompanied by a supporting statement detailing the accomplishments of the nominee. Supply information on present and former positions within NABIP, including the individual's connections with health insurance, educational background and degrees, special honors and membership and positions held in outside organizations. Most importantly, please provide specific accomplishments that, in your opinion, entitle your nominee to be considered for this prestigious award.
2. Nominations without supporting statements may not be given the same consideration by the Harold R. Gordon Committee as other applications with corroborating documentation.
3. Testimonial letters from industry and work colleagues, community leaders, and outside organizational leaders are welcome to be submitted with the other documentation as well.

Due date:**THE DEADLINE FOR RECEIPT OF SUBMISSION AND SUPPORTING DOCUMENTATION IS **MAY 6, 2025**.**Please submit to Brooke Willson at bwillson@nabip.org



Rusty entered the insurance industry in 1993 after a 12-year career in the grocery industry. After a short 3 year span of selling Medicare Advantage products for PacifiCare of Texas he was given the opportunity to develop a vision HMO product for Eye Care Centers of America where he excelled at the group product level. Realizing the need to connect with more insurance agents, he became a member of NAHU 1998 but quickly realized the association was more than he ever imagined. He immediately became involved serving various committee roles for his local chapter in San Antonio which led to his eventual presidency in 2005. During his presidency, Rusty felt the need to give back to the community. He and his wife, Lori, adopted an inner-city school, Douglass Academy, where they were instrumental in providing several programs such as a mentor reading club, made up of SAAHU members, who read to students each Friday. Douglass Academy underwent construction to expand to accept more grade levels however funding was barely enough to build out the school.

Through Rusty's efforts, the association assisted the school by spending several weekends painting of the interior of the school which was accidentally left out of the district's budget. Rusty also raised the funds to place picnic tables in the courtyard so students could enjoy eating their lunch outdoors. He and his wife also organized efforts to raise money to purchase grade level library books and spearheaded the donation of 2500 books by a local publishing company. For his efforts he was awarded the chapters Underwriter of the Year Award in 2007 and the Dave Clark Lifetime Achievement Award in 2010.

Rusty also served at the state level in Texas, becoming President in 2009 when the chapter won numerous awards. Rusty introduced forward thinking strategic planning that not only focused on the immediate needs of the chapter but established a parking lot of long-term goals to strive for. In addition, Rusty re-resurrected the states golf tournament, held in conjunction with their annual convention and was able to raise over Twenty Thousand Dollars for the Treehouse Day School, a center for preschool aged children with autistic needs. For his leadership efforts he was awarded the NAHU Distinguished Service Award and NAHU Presidential Citation. Rusty is also the recipient of the 2012 Shirley Hutzler Legislative Excellence Award, the 2010 Ken Martin Excellence in Communication Award. In 2016 Rusty Received the highest honor bestowed upon a member of Texas, the Hollis Roberson Award.

Rusty has been at the forefront of legislation at both the local, state and national level attending every TAHU Legislative day and Capitol Conference since 2004. He was also a panelist in, then Governor Perry's Think Tank meeting regarding healthcare options and trends for Texas. He was also a guest speaker in a mock congressional hearing of a joint

effort of the Austin Community College District and the University of Texas. In 2010 Rusty also testified with Beth Ashmore in front of the Texas Senate Commission on the State Affairs regarding the role of the insurance agent and the value they bring to public they serve.

With the introduction of the Affordable Care Act, Rusty created continuing education courses that broke down the bill, and eventually the law, and taught over 200 hours to association chapters, employer groups, their clients, and Chamber of Commerce chapters throughout the state. Constantly giving back to the industry, Rusty has taught over 100 hours of Ethics CE classes and over 200 hours of various other topics.

In 2013 Rusty was elected by the membership to serve as the NAHU Regional Vice President followed by Secretary, Vice President, President Elect and served as President of NAHU in 2018-2019. In his run for Secretary, Rusty ran on the platform that NAHU needed to begin to think long term as well as find ways to better communicate with their members. As Secretary, Rusty immediately began to work with Jim Stenger, Mike Embry and then CEO Janet Trautwein on Vision 2020, a look at what NAHU needed to be focused on leading up to 1-1-2020. The strategic plan looked at why NAHU exists and how we can deliver on our needs of our members by ensuring the association was moving in the direction of our industry. Vision 2020 was put into place in 2017 that focused on 3 key items, Legislation, Membership and Professional Development, and laid the groundwork for the years to come.

Rusty also saw the need to include our Professional Development chair as part of the BOT to ensure member training was included in the decisions of the board.

In line with long term thinking, during his presidency Rusty developed the futures task force, designed at looking at where our industry would be in the next 5-10 years and what the association needed to do to ensure we continued to meet the needs of our members. The futures task force was made up of professionals from across the country in every aspect of our industry. Their findings were presented to the BOT in June 2019 and were a focal point in the BOT's development of the 2025 strategic plan.

Rusty also worked with staff to expand the NAHU mobile app as a way of communicating with our membership with immediate results. The app allowed NAHU to send out targeted messages to specific regions, announcements of upcoming events, weekly legislative updates and more. Rusty worked well past his presidency to continue to develop the app until it was eventually replaced in 2024.

After his presidency, Rusty also continued to serve, now NABIP, facilitating local and state chapters strategic planning meetings. His forward-thinking planning sessions are sought out by many chapters across the country and have helped struggling chapters restructure and reach new heights.

In 2021 Rusty established the Rusty Rice foundation which focuses on providing free eye examinations and free eyeglasses to children from disadvantaged backgrounds. He works with local schools and children's shelters to make sure that every child has an opportunity to succeed in school.

Rusty has been with Avesis LLC since September 2003 serving many roles. He is now the Director of Commercial Sales responsible for leading a team of Sales Managers across the US to meet their individual production goals. Rusty is also responsible for the Texas and Central US markets as well as focusing on National reinsurance opportunities. He is an 18 year member of the Leading Producer Round Table and Lifetime Qualifying - Carrier Golden Eagle.

Rusty lives in Boerne Texas with his Wife Lori, an insurance agent, and their 2 sons, Quinten and Skyler. Rusty's Daughter Morgan lives in Temple with her husband Derrick and Daughter Brazley and son Ledger. In his spare time you will either find him on the golf course or at his family ranch in South Texas where he has the opportunity to enjoy the outdoors with his family and friends.

RUSSELL (RUSTY) L. RICE

8830 Buckskin Dr.
Boerne, TX. 78006
Home (210) 698-8403
Cellular (210) 602-9386

* SPANISH SPEAKING

SUMMARY

Over the past 23 years, my experience as a Regional Sales Representative, Regional Sales Manager and regional vice President has produced successes in every avenue of group product sales. Experience has also been gained in product development, marketing, underwriting, utilization reporting and department/office development from an initial start up phase. The use of diplomacy dealing with clients/customers in order to develop and maintain relationships is also a necessary part of day to day operations as well as excellent written and oral communication skills. Considered a self-starter, who can either work in a team environment or on an individual basis.

PROFESSIONAL EXPERIENCE

9/03 – Director of Commercial Sales, Avesis LLC

San Antonio TX 78006 - Regional office in San Antonio, Texas

- Responsible for National Sales Team Performance
- Responsible for Product development to ensure Avesis vision plan products remain competitive
- Responsible for recruiting and hiring sales members across the US
- Responsible for Sales and Service of Avesis Incorporated vision and dental programs.
- Establish direct contact with all size Employer Groups
- Establish direct contact with Insurance Brokers as well as educate them on Avesis Incorporated vision and dental plans.
- Establish direct contact with Health Plans, Commercial and Government.
- Establish product identity in key markets for new hire capabilities
- Converted over 80% of ECCA vision business to Avesis clients
- Avesis 3rd Party Trainer
- Avesis Healthcare Reform Expert & Presenter
- Regional Practice Leader for Guardian Vision
- Over \$30 Million in personal Production on a goal of \$750,000 per year

10/95 – 9/03 Western Regional Sales Manager, ECCA Managed Vision Care, Inc.

San Antonio, TX. 78213. Region includes TX, LA, OK, MO, KS, IA, NE, SD, ND, NM, CO, AZ, UT, NV, ID, OR and WA.

- Designed employer group vision plans and rating model currently offered by ECCA MVC.
- Trained Network of company owned stores and independent Optometrists on vision plans and introduced different clients by plan.
- Created and maintained national marketing materials.
- Created rating model currently used by ECCA MVC for employer groups and health plans.
- Implemented computer based leads tracking systems, proposal response formats, utilization reporting and established a system for generating leads.
- Developed and implemented sales support team of Account Service Managers and Membership Coordinators.
- Member of the ECCA MVC Credentialing and Quality Assurance Committee.
- Doubled personal book of business sales each year; 1996 \$1 million, 1997 \$2 million, 1998 \$4 million, 1999 \$8 million. Responsible for delivering in excess of \$12 million in 2000 and in excess of \$26 million in 2001. 2002 sales were \$30 million. (Based on premiums and incremental store sales)
- Delivered in excess of 10 million members via premium and discount vision plans.

- Responsible for training new sales representatives and developing sales force.
- Other accomplishments include developing national broker mail-out, open enrollments, participation in health fairs, servicing of major accounts.

01/93 - 09/95 Sales Representative, Secure Horizons,

8200 IH-10 West, Ste. 1000, San Antonio, TX. 78230

Job responsibilities: Creating lead base through phone duty, group presentations, health fairs, referrals and personal contacts. Troubleshooter for the Telemagic leads tracking software. Develop and maintain comparison between competitors. Developed the ability to run daily reports, creating form letters, and system upgrades as necessary. Closing ration exceeded 55%.

12/81 - 01/93 Employed by H.E.Butt Grocery Company, San Antonio, TX.

Positions Held - District labor scheduling trainer while also holding position of Service Director managing over 300 partners. Also held positions of Service Manager, Assistant Service Manager, Key Person, Produce Assistant Manager, District Electric Pallet Jack Safety Instructor, Produce Clerk, Frozen Food Clerk, Checker and Courtesy Clerk. 1989 Spirit Award Winner.

ABILITIES

Product development, lead base development, presentations to corporation presidents or to large groups of people, market items from introduction to end. Experience in policy implementation, payroll, performance appraisals, scheduling, budgeting total operations, interviewing, hiring, orientation and training of new employees. Able to establish rapport with customers associated with a negative experience. Continuing Education instructor on various topics including Healthcare Reform.

ACTIVITIES

Served as NAHU President from July 2018 through June 2019, NAHU Board of Directors 2012-2020, TAHU Board of Directors 2003-2018 (President 2009-2010), SAAHU Board Member 2000 – 2014 (President 2004-2005), Trailwood Restrictions Committee 2000 – 2015, St. Elizabeth Ann Seton Faith Formation board member 2002 – 2007, ECCA MVC Quality Assurance and Utilization Committee 1999-2003, PacifiCare of Texas Foundation Allocation Committee 1994 - 1995, PacifiCare Role Model Program 1993 - 1995, DECA Scholarship Steering Committee 1992 - 1993, San Antonio District III Toastmasters Club 1992-1993, Coach/Player U.T.S.A. Intercollegiate Softball 1986 -1988.

AWARDS

Avesis Most Improved Sales Award-2004, Avesis Corporate Choice Award -2006, Avesis Sales Producer of the Year 2007 & 2009, Avesis Sales Excellence Award 2008, SAAHU Underwriter of the year 2006, Dave Clark Lifetime Achievement Award 2009, TAHU Public Service Award -2002, Ken Martin Excellence in Communicatinos 2010, Shirley Hutzler Legislative Excellence Award 2012, NAHU William T. Flood Award Winner -2002, NAHU Presidential Citation -2009, NAHU Distinguished Service Award -2009, TAHU Hollis Roberson Award recipient 2016.

HOBBIES

Most outdoor activities including – Yard work, golf, hunting, fishing, camping, softball, flag football and soccer,

EDUCATION

The University of Texas at San Antonio
Bachelor of Science Degree, December 1988
Major: Physical Education

REFERENCES

Available Upon Request

Russell Lee Rice

POSITIONS HELD

San Antonio Association of Health Underwriters (SAAHU)

2001-2002	Public Service Chair
2002-2003	First Vice President
2003-2004	President Elect
2004-2005	President
2004-2005	Tech/Web Chair
2004-2005	Awards Chair
2005-2006	Immediate Past President
2006-2007	Trustee
2007-2008	Trustee
2008-2009	Tech/Web Chair
2008-2009	Trustee
2009-2010	Trustee Emeritus
2010-2011	Legislative Chair
2011-2012	Legislative Chair
2012-2013	Trustee Emeritus
2013-2014	Trustee Emeritus
2014-2015	Trustee Emeritus / Special BOT Liaison
2015-Present	Trustee Emeritus

Texas Association of Health Underwriters (TAHU)

2004-2005	Chapter President
2005-2006	Retention Chair
2006-2007	2 nd Vice President
2006-2008	1st Vice President
2008-2009	President Elect
2009-2010	President
2010-2011	Immediate Past President
2011-2012	Trustee
2012-2013	Trustee
2013-2014	Trustee
2014-2015	Trustee Emeritus , Industry Relations Chair
2015-2016	Trustee Emeritus, Federal Legislative Chair
2016-2017	Trustee Emeritus, Federal Legislative Chair

National Association of Health Underwriters (NAHU)

2011-2012	Media Relations Committee representing Region VI
2012-2013	Region VI Vice President
2013-2014	Region VI Vice President
2014-2015	Legislative Council – Working group on Staffing & PEOs, Industry Culture Task Force
2015-2016	NAHU Secretary
2016-2017	NAHU Vice President
2017-2018	NAHU President Elect

2018-2019	NAHU President
2019-2020	NAHU Immediate Past President

YEARS OF SERVICE

National Association of Health Underwriters (NAHU) Annual Convention & Exhibition

2002	Alternate Delegate for SAAHU
2003	Delegate for SAAHU
2004	Delegate for SAAHU
2005	Delegate for SAAHU
2006	Delegate for TAHU
2007	Alternate Delegate for SAAHU
2007	Delegate for TAHU
2008	Delegate for TAHU
2009	Delegate for TAHU
2010	Delegate for TAHU
2011	Delegate for TAHU
2012	Delegate for SAAHU
2013	Delegate for NAHU
2014	Delegate for NAHU
2015	Delegate for Panhandle AHU
2016	Delegate for NAHU
2017	Delegate for NAHU
2018	Delegate for NAHU
2019	Delegate for NAHU
2020	Delegate – NAHU Past President
2021	Delegate -NAHU Past President (virtual)
2022	Delegate – NAHU Past President
2023	Delegate – NAHU Past President
2024	Delegate – NAHU Past President

National Association of Health Underwriters (NAHU) Capitol Conference

2004	Washington, DC
2005	Washington, DC
2007	Washington, DC
2009	Washington, DC
2010	Washington, DC
2011	Washington, DC
2012	Washington DC
2013	Washington DC
2014	Washington DC
2015	Washington DC
2016	Washington DC
2017	Washington DC
2018	Washington DC
2019	Washington DC

2020	Washington DC
2021	Virtual
2022	Washington DC
2023	Washington DC
2024	Washington DC

National Association of Health Underwriters (NAHU) Future Leaders Forum

2005	Washington DC
2009	Washington, DC
2012	Washington DC
2013	Washington DC
2014	Washington DC
2015	Washington DC
2016	Washington DC
2017	Washington DC
2018	Washington DC
2019	Washington DC

Texas Association of Health Underwriters (TAHU) Region V & VI Leadership Conference

2004	New Orleans, LA
2005	San Antonio, TX
2006	Corpus Christi, TX
2007	Little Rock, AR
2008	New Orleans, LA
2011	New Orleans, LA
2012	St. Louis MO
2013	New Orleans, LA
2014	Tulsa, OK
2015	Fort Worth
2016	Chicago IL, Combined Region III & VI
2017	Scottsdale AZ, Combined Region 6 & 7
2018	New Orleans LA, Combined Region 5 & 6
2019	Nashville TX, Combined Region 5 & 6
2020	Cancelled – Virtual

Texas Association of Health Underwriters (TAHU) Annual Convention

2001	San Antonio, TX
2002	Austin, TX
2003	Fort Worth, TX
2004	Corpus Christi, TX
2005	Sugarland, TX
2006	Dallas, TX
2007	Galveston, TX
2008	El Paso, TX

2009	Dallas, TX
2010	Houston, TX
2011	San Antonio
2012	Corpus Christi
2013	Fort Worth, TX
2014	San Antonio, TX
2015	Houston TX
2016	Fort Worth TX
2017	Houston TX
2018	San Antonio TX
2019	Dallas TX
2020	Virtual
2021	Austin TX
2022	Fort Worth TX
2023	Houston TX
2024	Dallas TX

Texas Association of Health Underwriters (TAHU) Day at the Capitol

2004	Dallas, TX
2005	Austin, TX
2006	Dallas, TX
2007	Austin, TX
2008	Dallas, TX
2009	Austin, TX
2010	Austin, TX
2011	Austin TX
2012	Austin TX
2013	Austin TX
2014	Austin TX
2015	Austin TX
2016	Austin TX
2017	Austin TX
2018	Austin TX
2019	Austin TX
2020	Virtual
2021	Virtual
2022	Austin TX
2023	Austin TX
2024	Austin TX

AWARDS

San Antonio Association of Health Underwriters (SAAHU)

2005	NAHU Public Service Award
2007	Underwriter of the year
2009	Dave Clark Lifetime Achievement Award

Texas Association of Health Underwriters (TAHU)

2003	<i>Public Service Award</i>
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2010	<i>Ken Martin Excellence in Communications</i>
2011	Shirley Hutzler Legislative Excellence Award
2016	Hollis Roberson Award

National Association of Health Underwriters (NAHU)

2009	Distinguished Service Award
2009	Presidential Citation

NAHU Recognitions

2004	Triple Crown Recipient – Q4
2005	Triple Crown Recipient – Q2
2005	Chapter Awards Under Rusty's SAAHU Leadership
	Pacesetter Award
	Public Service Award
	Large Chapter Membership Gain Award
	Overall Membership Champion Award
2007	Leading Producers Round Table (LPRT) – Golden Eagle Carrier Rep
2008	Leading Producers Round Table (LPRT) – Golden Eagle Carrier Rep
2009	Triple Crown Recipient – Q1
2009	Leading Producers Round Table (LPRT) – Golden Eagle Agency
2010	Leading Producers Round Table (LPRT) – Golden Eagle Carrier Rep
2010	Triple Crown Recipient – Q4
2010	Chapter Awards under Rusty's TAHU Leadership
	Landmark Award
	Website Award
	Media Relations Award
	Legislative Excellence
	Blue ribbon of Excellence
	Most New Members – Large Chapter
2011	Triple Crown Recipient 0 Q3
2011	Leading Producers Round Table (LPRT) – Golden Eagle Carrier Rep
2012	Triple Crown Recipient
2012	Leading Producers Round Table (LPRT) – Golden Eagle Carrier Rep
2013	Triple Crown Recipient – Q2
2013	Leading Producers Round Table (LPRT) – Golden Eagle Carrier Rep
2014	Triple Crown Recipient – Q3
2014	Leading Producers Round Table (LPRT) – Golden Eagle Carrier Rep
2015	Leading Producers Round Table (LPRT) – Golden Eagle Carrier Rep
2016	Leading Producers Round Table (LPRT) – Golden Eagle Carrier Rep
2017	Leading Producers Round Table (LPRT) – Golden Eagle Carrier Rep
2018	Leading Producers Round Table (LPRT) – Lifetime & Qualifying Golden Eagle Carrier Rep
2020	Leading Producers Round Table (LPRT) – Lifetime & Qualifying Golden Eagle Carrier Rep
2021	Leading Producers Round Table (LPRT) – Lifetime & Qualifying Golden Eagle Carrier Rep
2022	Leading Producers Round Table (LPRT) – Lifetime & Qualifying Golden Eagle Carrier
2023	Leading Producers Round Table (LPRT) – Lifetime & Qualifying Golden Eagle Carrier

Presentations

1-27-2010	Selling Vision Insurance Plans – Delta Dental Idaho
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2-13-2010 Mock Senate Hearing on Healthcare Reform – Austin Community College and the University of Austin

2-23-2010 Senate Committee on State Affairs – The Role and Importance of the Broker in the HealthCare delivery system

3-3-2010 San Angelo Chapter Start-up - - HC Reform with Implementation Timeline

3-4-2010 LAHU – HC Reform with Implementation Timeline & Radio Interview

3-12-2010 AAHU – Capital Conference Wrap Up Presentation

4-8-2010 PAHU - HC Reform with Implementation Timeline

4-16-2010 CBAHU - HC Reform with Implementation Timeline & Radio Interview

4-21-2010 SAAHU – HC Reform with Implementation Timeline

6-10- 2010 FWAHU – The Role and Importance of the Broker in the HealthCare delivery system

6-21-2010 Mullen Pension & Benefits – School Districts - HC Reform with Implementation Timeline

9-15-2010 DAHU - HC Reform with Implementation Timeline

10-26-2010 Chase Bank of Midland Bankers & Customers - HC Reform with Implementation Timeline

10-26-2010 Chase Bank of Odessa Bankers & Customers - HC Reform with Implementation Timeline

11-9-2010 CBAHU - HC Reform with Implementation Timeline

1-5-2011 Midland Chamber of Commerce – Healthcare Legislative Forum – Keynote Speaker & KWEX TV Interview on HC Reform

2-02-2011 Waco Chamber of Commerce - HC Reform with Implementation Timeline

3-9-2011 HOTAHU - HC Reform with Implementation Timeline

3-21-2011 San Antonio Lege Publication – Released to all local legislators with feedback from employers on the Affordable Care Act implications

7-15-2011 ETAHU - HC Reform with Implementation Timeline

9-1-2011 Society of Financial Professionals - HC Reform with Implementation Timeline

9-9-2011 HOTAHU – Ethics the NAHU Way

5-18-2012 KRV Radio Interview – HC Reform

8-28-2012 IBTX – San Antonio Employers - HC Reform with Implementation Timeline

8-29-2012 IBTX – Dallas Employers - HC Reform with Implementation Timeline

11-12-2012 EPAHU - HC Reform with Implementation Timeline

11-16-2012 HOTAHU - HC Reform with Implementation Timeline

2-6-2013 TEXOMA AHU - Ethics the NAHU Way

2-12-2013 ETAHU - HC Reform with Implementation Timeline

2-14-2013 AAHU - Ethics the NAHU Way

3-27-2013 IBTX – San Antonio Employers - HC Reform with Implementation Timeline

3-28-2013 IBTX – Dallas Employers - HC Reform with Implementation Timeline

4-12-13 CBAHU - HC Reform with Implementation Timeline & Ethics the NAHU Way

4-23-2013 Mullen Pension & Benefits – School District HC Reform and the impact in TRS ActiveCare

5-17-2013 ETAHU - Ethics the NAHU Way

6-11-2013 Pete Jaramillo Insurance Services HC Reform event – UHC Call Center, Harlingen Texas

6-12-2013 RGV Employee Benefits of Texas HC Reform Event – Harlingen TX Chamber of Commerce

8-15-2013 Tulsa AHU Luncheon – HC Reform course

8-29-2013 San Antonio AHU – Ethics the NAHU Way

9-5-2013 Lubbock AHU – HC Reform Course

9-11-2013 El Paso AHU – HC Reform Course

9-12-2013 Fort Worth AHU – HC Reform Course
 9-25-2013 IBTX – San Antonio Employers - HC Reform with Implementation Timeline
 9-26-2013 IBTX – Dallas Employers - HC Reform with Implementation Timeline
 11-5-2013 Hill Country Human Resource Management Association – HC Reform with Implementation timeline
 01-5-2014 Panhandle AHU – Ethics the NAHU Way
 2-18-2014 Austin AHU – Ethics the NAHU Way
 4-16-2014 San Antonio AHU – Ethics the NAHU Way
 9-10-2014 El Paso AHU - Ethics the NAHU Way
 9-26-2014 Corpus Christi AHU - Ethics the NAHU Way
 1-8-2015 Attended the Texas Public Policy Foundation Meeting representing TAHU
 1-21-2015 HC Reform Update – Mullen Pension & Benefits
 3-31-2015 Attended the NAIFA Houston Symposium to speak regarding co-branding Associations
 4-15-2015 Los Angeles AHU – Spoke as a candidate for NAHU Secretary
 4-17-2015 East Texas AHU – Spoke as a candidate for NAHU Secretary
 4-21-2015 North Carolina AHU - Spoke as a candidate for NAHU Secretary
 4-23-2015 Alabama AHU - Spoke as a candidate for NAHU Secretary
 4-30-2015 South Mississippi AHU - Spoke as a candidate for NAHU Secretary
 4-12-2015 Louisiana AHU - Spoke as a candidate for NAHU Secretary
 4-14-2015 Austin AHU - Spoke as a candidate for NAHU Secretary
 4-15-2015 East Texas AHU – Ethics the NAHU Way
 4-18-2015 California AHU Legislative Day - Spoke as a candidate for NAHU Secretary
 4-20-2015 Benefits Selling Expo – Attended as a candidate for NAHU Secretary
 6-2-2015 Colorado AHU - Spoke as a candidate for NAHU Secretary
 7-23-2015 San Antonio AHU – Ethics the NAHU Way
 8-6-2015 Lubbock AHU – Ethics the NAHU Way
 8-15-2015 Region VI Meeting – How to be a NAHU Leader
 10-16-2015 South Texas AHU – Ethics the NAHU Way
 12-10-2015 Austin AHU – Ethics the NAHU Way
 12-10-2015 Austin AHU – National Legislative Update CE 1 HR
 2-5-2016 Texas AHU Leadership Meeting – Update on NAHU Products
 2-11-2016 Fort Worth AHU - Update on NAHU Products
 2-16-2016 Houston AHU - National Legislative Update CE 1 HR
 3-1-2016 Wichita Falls AHU - National Legislative Update CE 1 HR
 3-29-2016 Dallas AHU Symposium - National Legislative Update CE 1 HR
 4-8-2016 South Texas AHU - National Legislative Update CE 1 HR
 4-28-2016 Heart of Texas AHU - National Legislative Update CE 1 HR
 4-28-2016 Heart of Texas AHU – Ethics the NAHU Way CE 2 HR
 5-23-2016 Frost Insurance Ethics the NAHU Way CE 2 HR
 5-25-2016 El Paso AHU – National Legislative Update CE 1 HR
 6-7-2016 Wortham Insurance - Ethics the NAHU Way CE 2 HR (2 classes)
 6-8-2016 Wortham Insurance - Ethics the NAHU Way CE 2 HR
 6-9-2016 Catto & Catto Insurance - Ethics the NAHU Way CE 2 HR
 6-15-2016 San Antonio AHU - Ethics the NAHU Way CE 2 HR
 6-17-2016 East Texas AHU – National Legislative Update CE 1 HR
 7-12-2016 Corpus Christi AHU – National Legislative Update CE 1 HR
 8-2-2016 Region 3 & 6 Meeting – The value of membership
 8-9-2016 Medicare Summit, Pala California – NAHU Medicare Legislative Update and the value of membership

8-25-2016 San Antonio AHU Medicare Boot Camp - NAHU Medicare Legislative Update and the value of membership

10-7-2016 Los Angeles AHU Medicare Summit - NAHU Medicare Legislative Update and the value of membership

11-16-16 Northwest Vista College – Ethics in the business world. How to excel in business

3-9-17 Lubbock AHU – NAHU Legislative Update

3-28-17 Dallas AHU – NAHU Legislative Update

4-5-17 Austin AHU – The Future of NAHU

4-28-17 TAHU Convention – The Future of NAHU

5-10-17 Metro Detroit AHU – Medicare and NAHU

5-19-17 East Texas AHU - The Future of NAHU

7-19-17 Dallas Texas AHU - The Future of NAHU

9-17-17 Florida AHU - The Future of NAHU

10-13-17 Coastal Bend AHU – NAHU Legislative Update

10-14-17 Asian Chamber of Commerce – Conducted board training

2-7-18 Catto & Catto Insurance Agency – Ethics the NAHU Way

4-10-18 Lubbock AHU – The Future of NAHU

4-12-18 Austin AHU – The Future of NAHU

4-20-18 East Texas AHU – NAHU Legislative Update

5-8-18 Special Insurance Services CE Day – Ethics the NAHU Way

6-2-18 Region 5&6 Conference – The Future of NAHU

6-15-18 Jackson AHU – The Future of NAHU

7-10-18 Corpus Christi AHU – NAHU Presidents Presentation

7-17-18 Frost Insurance Houston – Ethics the NAHU Way

7-20-18 East Texas AHU - NAHU Presidents Presentation

7-24-18 Region 8 Meeting - NAHU Presidents Presentation

8-2-18 Region 2 Meeting - NAHU Presidents Presentation

8-6-18 Region 3 Meeting - NAHU Presidents Presentation

8-23-18 Southern California Medicare Summit - NAHU Presidents Senior Product Presentation

9-7-18 South Texas AHU - NAHU Presidents Presentation

9-11-18 Florida AHU - NAHU Presidents Presentation

9-21-18 Los Angeles/Ventura County Medicare Summit - NAHU Presidents Senior Product Presentation

9-27-18 Detroit AHU Medicare Summit - NAHU Presidents Senior Product Presentation

1-8-19 Corpus Christi AHU – Ethics the NAHU Way

3-14-19 Oklahoma City AHU – Single Payer Presentation

3-22-19 South Carolina AHU Medicare Summit - NAHU Presidents Senior Product Presentation

3-28-19 Alaska AHU - NAHU Presidents Presentation

4-1-19 North Carolina AHU - NAHU Presidents Presentation

4-5-19 Western North Carolina AHU - NAHU Presidents Presentation

4-11-19 Alabama AHU - NAHU Presidents Presentation

4-17-19 Los Angeles AHU - NAHU Presidents Presentation

4-24-19 Idaho AHU - NAHU Presidents Presentation

4-26-19 Texas AHU - NAHU Presidents Presentation

4-30-19 Baltimore AHU - NAHU Presidents Presentation

5-2-19 Arizona AHU Expo – Ethics the NAHU Way

5-3-19 Region 5&6 Leadership Meeting - NAHU Presidents Presentation

5-7-19 New Jersey AHU - NAHU Presidents Presentation

5-14-19 Nevada AHU - NAHU Presidents Presentation

6-4-19	Colorado AHU - NAHU Presidents Presentation
6-11-19	Virginia AHU - NAHU Presidents Presentation
7-17-19	Dallas AHU – NAHU Presidents Presentation
8-26-19	Tulsa AHU Medicare Summit - Medicare and NAHU
8-27-19	Phoenix AZ Medicare Summit - Medicare and NAHU
1-20-21	Idaho AHU – Ethics the NAHU Way – 3 Hrs
4-26-21	Marsh Wortham – Ethics the NAHU Way
5-12-21	Colorado AHU – Ethics the NAHU Way – 3 Hrs
7-14-21	Corpus Christi AHU – Ethics the NAHU Way
5-18-22	South Texas AHU – Vision Care Basics
5-19-22	Austin AHU – Vision Care Basics
6-9-22	Fort Worth AHU - Vision Care Basics
6-14-22	Lone Star Chapter - Vision Care Basics (virtual)
6-15-22	San Antonio AHU – Vision Care Basics
8-11-22	OKC AHU – Facilitated Strategic Planning Meeting
8-16-22	Houston AHU – Vision Care Basics
8-17-22	DAHU Luncheon – Parliamentarian for the DAHU Membership meeting
8-18-22	Austin AHU – 3hr Ethics the NAHU Way
8-26-22	East Texas AHU – Vision Care Basics
9-9-22	South Texas AHU – Vision Care Basics
9-20-22/23	Brown & Brown Office – 3hr Ethics the NAHU Way – 4 classes
11-30-22	Brown & Brown Office – 3hr Ethics the NAHU Way
1-18-23	Dallas AHU – Vision Care Basics
1-26-23	Catto & Catto Insurance San Antonio – 3hr Ethics the NAHU Way
4-25-23	Carrier Panel – NABIP TX – The importance of Vision Benefits
5-18-23	Carrier Panel – NABIP AZ – Carriers looking forward
7-12-23	NABIP UT – Facilitated Strategic Planning Meeting
8-9-23	NABIP UT – Implemented the Strategic Plan at board meeting
8-16-23	NABIP Iowa – Vision Care Basics CE – Virtual 1Hr
2-21-24	NABIP Dallas – Vision Care Basics CE – 1 HR
3-20-24	NABIP Dallas - 3hr Ethics the NAHU Way
4-4-24	NABIP Austin - Vision Care Basics CE – 1 HR
5-2-24	NABIP South Texas - Vision Care Basics CE – 1 HR
5-14-24	NABIP Iowa - Vision Care Basics CE – 1 HR – Webinar
8-15-24	NABIP Austin - 3hr Ethics the NAHU Way
3-4-25	Holmes Murphy Iowa - 3hr Ethics the NAHU Way
3-5-25	Iowa Bankers Association - 3hr Ethics the NAHU Way
3-18-25	Alliant Insurance Houston - 3hr Ethics the NAHU Way
3-28-25	NABIP East Texas - Vision Care Basics CE – 1 HR

NAHU Accomplishments

Vision 2020 with Jim Stenger and Mike Embry

Visited 48 chapters during Presidency.

Established the Futures Task Force which played a vital role in charting our future for vision 2025.

Revitalized the NAHU App as a source of information and income.

Helped to solidify our future in the Medicare Agent market by expanding Medicare Symposiums

LPRT – Lifetime Golden Eagle Carrier Rep – 17 years

