



# FUTURE FORWARD

*Connect, Innovate and Lead*

June 28 - July 1, 2025

Fontainebleau Hotel | Miami, FL

## 2025 ANNUAL CONVENTION SCHEDULE

### PRELIMINARY

#### FRIDAY, JUNE 27

9 am - 5 pm 2024 - 2025 NABIP Board meeting

*Splash 5/6*

3 pm Exhibit company setup

*Sparkle East & West*

6 - 8 pm Board dinner

*Offsite*

#### SATURDAY, JUNE 28

8:30 am - 6 pm Registration/Credentialing

*Ocean Promenade West*

8:30 am - 2 pm Region 2, 5, 6 Leadership Summit

*Glimmer 1*

8:30 am - 2 pm Exhibitor Setup

*Sparkle East & West*

2:15 - 3 pm First timers event

*Glimmer 1*

2 - 5 pm Big Splash Sponsor event

*Poolside*

6 - 8 pm Welcome Reception and Party in the NABIP Marketplace

*Sparkle East & West*

8 pm On Your Own in Miami Beach

#### SUNDAY, JUNE 29

6:30 - 7:30 am Wellness Activity

*TBD*

7 am - 4 pm Registration/Credentialing

*Ocean Promenade West*

7:30 - 8:30 am NABIP Marketplace with complimentary breakfast

*Sparkle East & West*

8:30 am - 12 pm General Session:

*Glimmer 5,6,7*

- Welcome
- Nominations and candidate speeches
- National Chapter Awards
- Introduction to the Coalition for Inclusion in Benefits and Insurance & the New Spanish Certification
- Featured Speaker **TBD**
- Keynote Speaker **Vani Hari, Food Babe: How Your Voice Can Change the World**
- Wrap up

9 am - 5 pm NABIP PAC Lounge Open

*Splash 5/6*

# SUNDAY, JUNE 29 CONTINUED

12 - 2 pm NABIP Marketplace Open with complimentary lunch

Sparkle East & West

2 - 4:45 pm General Session:

Glimmer 5,6,7

- National Membership Awards
- The Power of Wellness: Women's Health at Work
  - Mark Amouzgar, March Health
  - Karinn Glover, MD
  - Brenda Navin, Launch My Health
  - Jessica Shepherd, MD
- REBC/Leadership Academy Graduation
- PAC Parade of Checks
- Delta Force Update
  - Mark Gaunya, Chair
- NABIP Town Hall
  - Jessica Brooks-Woods, CEO
  - Alycia Riedl, President
  - Susan Rider, President-Elect
  - Mychal Walker, Treasurer

6:30 - 9:30 pm LPRT Member Event, by invitation only

Glimmer 5,6,7

# MONDAY, JUNE 30

6:30 - 7:30 am Wellness Activity

TBD

7:30 am - 2 pm Registration/Credentialing

Ocean Promenade West

7:30 - 8:45 am NABIP Marketplace with complimentary breakfast

Sparkle East & West

8:30 am - 4:15 pm NABIP PAC Lounge Open

Splash 5/6

8:30 - 9:15 am General Session:

Glimmer 5,6,7

- Featured Speaker [Connie Podesta](#): Stand up communication: Life would be easy if it weren't for other people

9:30 - 10:15 am Breakout Sessions

Medicare & Healthcare Innovation

Glimmer 1

• **Getting Down & Dirty with Medicare Regulation**

- Amanda Brewton, Medicare Answers Now
- Chalen Jackson, McNerney Management Group

Agency Growth & Business Strategies

Glimmer 2

• **Innovations in Group Health Insurance: Not an Oxymoron**

- Dave Dickey, Second Story Sales

Technology

Glimmer 3

• **Tech Specialist/Trends in the employee benefits space - what's next?**

- Dave Kerrigan, BenefitPitch

Leadership

Splash 9/10

• **Elevating Your Communication Skills, an interactive and high-level session**

- Connie Podesta, Connie Podesta Presents

10:30 - 11:15 am Breakout Sessions

Medicare & Healthcare Innovation

Glimmer 1

• **Reimagining Benefits: The Strategic Role of Brokers in the Evolving Health Insurance Landscape**

- Annette Bechtold, Forte Consulting
- Mark Mixer, HRASimple, LLC

Agency Growth & Business Strategies

Glimmer 2

• **Crushing Leads: A guide to squeezing the most out of your prospecting**

- Justin Jacobs, Health Plan Markets

Technology

Glimmer 3

• **Setting the new standard for employee healthcare: Harnessing AI for personalized care and broker success**

- Guy Benjamin, Healthee

Leadership

Splash 9/10

• **Beyond Sales: The Leadership Shift That Fuels Sustainable Growth**

- Jenn Walsh, GenuineShift

# MONDAY, JUNE 30 CONTINUED

|                     |  |                                |
|---------------------|--|--------------------------------|
| 11:30 am - 12:15 pm | Breakout Sessions  |                                |
|                     | Medicare & Healthcare Innovation   | <i>Glimmer 1</i>               |
|                     | <ul style="list-style-type: none"> <li>• <b>Thinking Bigger. How Brokers Can Bridge Healthcare Gaps</b></li> <li>▸ Samantha George, <i>The Baldwin Group Health Insurance</i></li> </ul>   |                                |
|                     | Agency Growth & Business Strategies  | <i>Glimmer 2</i>               |
|                     | <ul style="list-style-type: none"> <li>• <b>M&amp;A Panel: Agency Growth Playbook: Build Buy or Sell</b></li> <li>▸ Moderator: Perry Braun, <i>Benefit Advisors Network</i></li> </ul> <p>Panelists:</p> <ul style="list-style-type: none"> <li>▸ Ted Crawford, <i>OneDigital</i></li> <li>▸ Tim Kanter, <i>InsZone Insurance</i></li> <li>▸ Tommy McDonald, <i>MarshBerry Managing</i></li> </ul>   |                                |
|                     | Technology   | <i>Glimmer 3</i>               |
|                     | <ul style="list-style-type: none"> <li>• <b>The Cyber Imperative: Protecting Your Data and Your Clients</b></li> <li>▸ Joseph Saracino, <i>Cino Security Solutions</i></li> </ul>  |                                |
|                     | Leadership   | <i>Splash 9/10</i>             |
|                     | <ul style="list-style-type: none"> <li>• <b>The Champion's Code: Building a Culture of Excellence and Leadership in a Disruptive World</b></li> <li>▸ Ross Bernstein, <i>Ross Bernstein Speaking</i></li> </ul>  |                                |
| 12:15 - 2:15 pm     | NABIP Marketplace with complimentary lunch   | <i>Sparkle East &amp; West</i> |
| 2:15 - 3:30 pm      | General Session:   | <i>Glimmer 5,6,7</i>           |
|                     | <ul style="list-style-type: none"> <li>• National Individual Awards</li> <li>• Our Needs Matter: An Innovation Discussion with Large Employers</li> <li>▸ Moderator: Dave Dickey, <i>Second Story Sales</i></li> </ul> <p>Panelists:</p> <ul style="list-style-type: none"> <li>▸ Tom Armani, <i>Dayforce</i></li> <li>▸ Denise King, <i>Medtronic</i></li> <li>▸ Rosa Novo, <i>Executive Benefits Director, Miami-Dade County Public Schools</i></li> </ul> |                                |
| 3:45 - 4:30 pm      | Regional Meetings  |                                |
|                     | Region 1: CT, ME, MA, NH, NY, RI, VT   | <i>Splash 7/8</i>              |
|                     | Region 2: DE, MD, VA, NJ, PA   | <i>Splash 11</i>               |
|                     | Region 3: IL, IN, KY, MI, OH, WV   | <i>Splash 9/10</i>             |
|                     | Region 4: MN, IA, NE, ND, SD, WI   | <i>Splash 12</i>               |
|                     | Region 5: AL, FL, GA, MS, NC, SC, TN   | <i>Glimmer 1</i>               |
|                     | Region 6: AR, KS, LA, MO, OK, TX   | <i>Glimmer 3</i>               |
|                     | Region 7: AZ, CO, ID, MT, NM, UT, WY   | <i>Glimmer 2</i>               |
|                     | Region 8: AK, CA, HI, NV, OR, WA   | <i>Glimmer 5,6,7</i>           |
| 6:30 - 7 pm         | Friends of Bill W  | <i>Plunge Boardroom</i>        |
| 6:30 - 7:30 pm      | Harold R. Gordon Annual Awards Gala Reception  | <i>Luster Gallerie</i>         |
| 6:30 - 7:30 pm      | LPRT Soaring Eagle/Past NABIP Presidents/Gordon Recipients Reception   | <i>Splash 11/12</i>            |
| 7:30 - 9:30 pm      | Harold R. Gordon Annual Awards Gala for Ticketed Guests. Formal Attire   | <i>Glimmer 5,6,7</i>           |
| 9:30 - 11:30 pm     | Gordon Gala After Party - Open to All Convention Attendees.<br>Dress to Impress  | <i>Glimmer 1,5,6,7</i>         |

# TUESDAY, JULY 1

|                     |   |                      |
|---------------------|---|----------------------|
| 7 - 8 am            | Wellness Activity   | <i>TBD</i>           |
| 9 - 10:30 am        | General Session:  | <i>Glimmer 5,6,7</i> |
|                     | <ul style="list-style-type: none"> <li>• PBMs Unmasked: How to Evaluate, Compare, and Contract with Confidence</li> <li>▸ Moderator: Eric Barker, <i>True Rx Health Strategists</i></li> </ul> <p>Panelists (Panel in formation):</p> <ul style="list-style-type: none"> <li>▸ Greg Baker, <i>Affirmed Rx</i></li> <li>▸ Mark Cuban, <i>Cost Plus Drugs</i></li> <li>▸ Matt Jarvis, <i>Lockton</i></li> <li>▸ Christine Johnston, <i>Foundational Pharmacy Strategies</i></li> <li>▸ Marc Sweeney, <i>Profero Team</i></li> </ul> |                      |
| 10:30 am - 12:30 pm | House of Delegates/Voting   | <i>Glimmer 5,6,7</i> |
| 12:30 - 2:30 pm     | 2025 - 2026 NABIP Board meeting   | <i>Splash 5/6</i>    |