

FROM THE DESK OF THE CEO

The second quarter 2025 was a quarter of record-setting progress for NABIP. We launched the PY2026 Medicare Advantage Certification with nearly 2,000 brokers registered in the first week. Membership grew 10% over our nine-year Q2 average, and our Annual Convention achieved historic attendance of over 800 participants, delivering outstanding programming and revenue performance.

These achievements reflect the strength of our **NABIP Strategic Framework**, which unites our mission, pillars, priorities, and KPIs into one cohesive path.

NABIP Strategic Framework



Key Performance Indicators

Operational Excellence • Industry Influence • Financial Vitality



Strategic Priorities

Organizational Performance • Sustainable Growth & Innovation • Visibility & Influence



Strategic Pillars

Membership • Advocacy • Professional Development



Ethos: The American Consumer Healthcare Bill of Rights

Access and Affordability • Consumer Empowerment • Professional Responsibility



Vision & Mission

To advocate, educate, and empower benefits professionals.
Equitable, high-quality, affordable care for all.

This framework aligns all NABIP initiatives toward our shared objectives. Each element builds upon the foundation below it, creating a cohesive pathway to organizational success.

Rooted in our Healthcare Bill of Rights, this framework ensures every initiative advances access, affordability, and professional excellence – setting the stage for even greater impact in the months ahead.

Together we can.



Jessica Brooks-Woods
CEO, NABIP

Jessica L. Brooks

OPERATIONAL EXCELLENCE

PROFESSIONAL DEVELOPMENT & EDUCATION

PY2026 Medicare Advantage Certification

- Launched June 23 with CE approval in all 50 states within one week.
- Nearly 2,000 brokers registered by quarter's end.
- Revenue exceeded \$20K in week one alone.

[Click to see now](#)

More than 60 Million Americans Are Covered by Medicare and Medicare Advantage.

Are you certified to help them?

NABIP is proud to announce its new Medicare, Medicare Advantage and Compliance Certification program designed to help brokers maintain their status to sell and service plans as required by CMS.

Designed by brokers for brokers, NABIP's comprehensive online program provides brokers with a variety of benefits, including:
- Top-tier Medicare Advantage training
- Regional instruction on Medicare Advantage plan rules and the latest market trends
- Self-paced education modules at no additional cost
- Specialized marketplace review and regional content
- Nationally recognized certification logs for marketing

Nearly 80% of respondents indicated they were highly likely to recommend this course to a friend or colleague.

"This is my second year certifying with NABIP, and I would go back. It's written by agents, not insurance companies. And the content is more relevant, easier to apply—and CE is included!" — Jan H.

ONLY \$100

Scan and learn how to register today!
Visit www.nabip.org today for more information about how you can stay compliant with CMS regulations.

Questions?
professionaldevelopment@nabip.org
(844) 257-0990



Q4i Sales Training Program

- Offers step-by-step, broker-specific guidance on building sales pipelines, qualifying leads, and deepening client relationships.
- Enhances NABIP's professional development portfolio with valuable new opportunities.
- MORE Sales System by Q4intelligence. The MORE™ Sales System empowers you to control your growth by creating meaningful, client-focused sales interactions that build lasting value.

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Spanish Language Benefits Education (SLBE)

- Equipping benefit professionals with the skills, cultural awareness, and ethical standards to effectively serve Spanish-speaking clients and grow their business with confidence.
- Two CE-approved modules designed for:
 - Culturally fluent communication
 - Ethical engagement with Spanish-speaking populations
- Be part of our inaugural class, lock in your discount, and set yourself apart from your competitors.

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Spanish Language Benefits Education (SLBE) Certification

Equipping benefit professionals with the skills, cultural awareness, and ethical standards to effectively serve Spanish-speaking clients and grow their business with confidence.

ONABIP COALITION FOR INCLUSION FUTURE SOLUTIONS

CIBI, The Coalition for Inclusion in Benefits and Insurance, Powered by NABIP, is here to support ALL benefits professionals who want to GROW their businesses by serving this market with ETHICS and EXCELLENCE.

PREPARE FOR Q4 2025

Two brokers want your business: your workforce includes Spanish-speaking employees. Which broker would you choose?

Broker A: "We can provide everything in Spanish."

Broker B: "I take a strategic approach to workforce engagement. I am SLBE certified and bring proven tools and processes."

Real results with Spanish-speaking employees come from strategy and process, not from Google Translate, OpenAI, or an overworked bilingual coworker.

Sessions1 (conducted in English)

Melissa Burkhardt will be presenting the 09/25/2025 (3:00 pm - 5:00 pm) session

2025 Engaging Spanish-Speaking Employees in Their Benefits, Risk, and Wellness Practices

Suzanne Kidenhour will be presenting the 10/23/2025 (3:00 pm - 5:00 pm) session

2025 2 Benefits for Speakers of Other Languages - Ethics, Compliance and Subtlety

Scan or click to register for a 50% discount



Regular price: \$300 YOUR price: \$150

Be part of our inaugural class, lock in your discount, and set yourself apart from competitors who want to cut corners instead of upping their game.

¡Adelante!

MEMBERSHIP GROWTH & ENGAGEMENT

Membership Growth & Engagement

-  **Q2 New Member Growth:** 10% increase over the 9-year Q2 average, reflecting heightened interest in NABIP's offerings and outreach strategies.
-  **Agency Dues Model Expansion:** 16 new agencies joined, bringing more employers into our collective voice and expanding access to NABIP tools and training.
-  **New Corporate Partnerships:** 2 new national partners joined our Corporate Partner Program, deepening our ecosystem of support.
-  **Chapter-Led Growth:** 29 chapters participated in our \$50 new member investment campaign, creating high-conversion events during NABIP gatherings.

Expanded Accessibility

NABIP now offers core marketing materials in Spanish to serve members and consumers, including translated membership fliers, campaign tools, and promotional language.

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The image displays three NABIP marketing materials. On the left is a Spanish membership flyer titled 'NABIP: el valor de la alianza' (NABIP: the value of the alliance), featuring the NABIP logo and text about the organization's mission and benefits. In the center is an English membership flyer titled '¡Únase a NABIP hoy!' (Join NABIP today!), also featuring the NABIP logo and text about the organization's mission and benefits. On the right is a Spanish proposal for value titled 'La propuesta de valor de NABIP' (The value proposition of NABIP), featuring the NABIP logo and text about the organization's mission and benefits.



Oklahoma Future Leader Summit – University of Tulsa

NABIP partnered with the **Oklahoma Chapter to host its first-ever Future Leader Summit** – designed to introduce college students to the health insurance profession. Planning is already underway to replicate this model in 2026 with regional expansion.



ANNUAL CONVENTION IN MIAMI – JUNE 28–JULY 1

Historic Achievements


-  **Highest-ever attendance:** >800 attendees across general sessions, breakouts, and networking events.
-  **Total Registration Revenue** was nearly **\$300K – 48% more than projected.**

Sponsorship & Exhibit Hall Revenue

-  **More than \$500K in gross sales** from booth packages, and sponsorships.



First-Time Attendee Milestone

-  **Record number of first-time attendees**, attributed to targeted outreach, segmented marketing, and promotion through chapter channels and social media.





Programming That Delivered

-  **Standing-room-only Medicare sessions spotlighted** compliance, legislative updates, and carrier trends.
-  **Panels addressed:**
 - Women's health and maternal care policy
 - Cybersecurity for benefits professionals
 - Large Group market trends
 - M&A deal flow and implications
 - PBM transparency with guest speaker Mark Cuban
-  **Main stage speaker Vani Hari energized attendees and engaged** with them personally in NABIP's booth – amplifying reach and visibility.




Awards & Recognition

-  **More than 40 chapters and members honored**, with recognition moved into general sessions – creating broader exposure and celebration.
-  **LPRT membership closed at 250**, majority as Soaring Eagles.



CIBI Official Launch

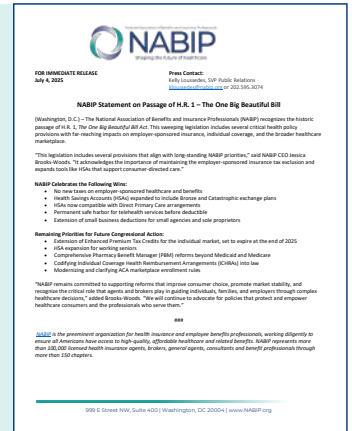
-  **The Coalition for Inclusion in Benefits and Insurance (CIBI)** was formally launched during Annual Convention.
-  **CIBI** will spearhead initiatives on representation, equity, cultural competency, and broker development, integrated across NABIP's programming and policy agenda.

GOVERNMENT RELATIONS & ADVOCACY



National & Regulatory Impact

-  **CMS Leadership Engagement:** Direct meetings on issues affecting Medicare Advantage agents, ACA plan brokers, and ICHRA regulations.
-  **Peter Nelson (CCIIO Director)** addressed attendees at Annual Convention on federal priorities and market trends.
-  **Big Wins in the Big, Beautiful Bill:**
 - Permanent telehealth and HDHP renewals.
 - Expansion of HSAs for Bronze & Catastrophic plan holders.
 - Direct Primary Care supported.
 - No new taxation on employer-sponsored benefits.

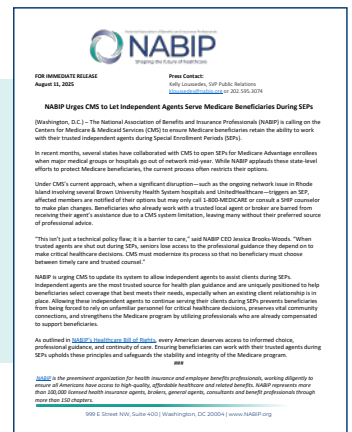
[Click to see now](#)





Legislative & Regulatory Activity

-  **Submitted formal letters to HHS and OMB** recommending the elimination or revision of burdensome regulations affecting brokers.
-  **Expanded collaboration with MedPAC, the Commonwealth Fund, Better Medicare Alliance,** and other thought leaders.

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Policy Advocacy Campaigns

-  **Operation Shout mobilized more than 12,000 messages to policymakers** on anti-agent bills, pharmacy benefit laws, and ACA tax credits.
-  **Reintroduced the COBRA as Creditable Coverage Act**, expanding partner support for this pro-consumer legislation.

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Employer Market RFI Response

-  **NABIP's Employer-Based Working Group submitted detailed comments to DOL on Gag Clause implementation rules, calling for:**


- Greater data access for employers.
- Transparency on fees and PBM practices.
- Clearer compliance guidance.

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STATE ADVOCACY UPDATE

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

 Total Number of Donors for Q2: **4527**

 **Individuals from 56 chapters** made contributions across all regions

| Region: | Qtr 2 | Count of Donors from Region |
|----------------------|-------------|-----------------------------|
| (R 1) Total Donated: | \$5,734.00 | 88 |
| (R 2) Total Donated: | \$30,569.00 | 466 |
| (R 3) Total Donated: | \$53,436.00 | 757 |
| (R 4) Total Donated: | \$33,259.00 | 380 |
| (R 5) Total Donated: | \$44,430.00 | 631 |
| (R 6) Total Donated: | \$48,491.52 | 819 |
| (R 7) Total Donated: | \$49,068.00 | 525 |
| (R 8) Total Donated: | \$76,924.00 | 822 |
| (Blank) | \$8,834.00 | 39 |

Total Contributions: \$350,745.52 4527

COMMUNICATIONS, PUBLIC RELATIONS AND MARKETING

Public Relations Highlights

 **18 press releases issued resulting in hundreds of press hits** across national and trade publications.

 **Featured stories on:**

- Medicare regulation and transparency
- Broker value campaigns
- Event previews and recaps

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Award-Winning Content



bip won the ASBPE National Silver Award for Best Redesign and 2025 Content Marketing Award finalist

bip Magazine Summer Issue featured **NABIP President Susan Rider**

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Email Metrics



 **>443K emails sent for Annual Convention alone**

 **Convention campaign open rate: 34.77% (industry average: 22%)**

Social Media Surge



Compared to 2024 Annual Convention:

 **+232% posts**  **+188% comments**  **+133% impressions**  **+40% follower growth**

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