



## FROM THE DESK OF THE PRESIDENT

As we continue **Racing Ahead**, we began this year with a clear focus on strengthening NABIP's foundation so we can accelerate our impact, amplify our voice, and create greater value for our members. Already, we're seeing significant momentum across membership growth, advocacy success, and national visibility.

Our journey is gaining speed. Following a highly successful Capitol Conference, major regulatory and legislative victories, and an expanded communications presence, NABIP continues to lead with purpose and deliver results.

In the first quarter alone, we welcomed **574 new members**, fueled by new agency participation and the dedicated recruitment efforts of our chapters nationwide. Our advocacy team secured meaningful wins, including regulatory rollbacks, legislative successes, and stronger engagement with federal policymakers—ensuring the voice of agents and brokers remains at the forefront of healthcare policy discussions.

At the same time, our communications and marketing efforts have helped drive NABIP's message further than ever before, generating hundreds of media placements, increasing member engagement, and reinforcing the critical role our profession plays in helping Americans navigate healthcare and employee benefits.

This report highlights the progress we've made and the momentum we're building for the road ahead. Together, we are accelerating growth, strengthening our influence, and advancing our mission.

**We are Racing Ahead. We are growing. We are leading. And together, we are shaping the future of NABIP.**

*Together we can.*



# OPERATIONAL EXCELLENCE

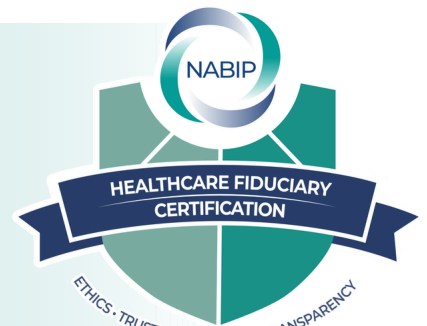
Education excellence + workforce development

## NABIP LEARNING INSTITUTE (NLI)

- NABIP advanced its Professional Development strategy in Q1 2026 through the launch of the [NABIP Learning Institute](#), strengthening certification programs, expanding workforce development pipelines, and scaling national education delivery.

### Fiduciary Certification Launch and Expansion

- NABIP completed its inaugural **Fiduciary Certification cohort in April** with 20 professionals, demonstrating early demand for fiduciary focused education.
- Building on this momentum, the [NABIP Healthcare Fiduciary Certification Webinar Series](#) will launch in July, expanding the program into a scalable national format and positioning NABIP to lead in compliance and fiduciary training.



### A Major Milestone for Medicare Certification

- NABIP's [Medicare Certification program](#) has achieved full national reach and is now accepted by all major carriers, including Aetna.
- This milestone significantly expands access for agents and brokers across all markets and reinforces NABIP's certification as a trusted industry standard.



### Workforce Development Pipeline Benefits Advisor Network Partnership

- NABIP advanced its partnership with the [Benefits Advisor Network](#) to support group focused education and training initiatives.
- This collaboration expands NABIP's reach into high performing agency networks and establishes a scalable pathway for developing group benefits professionals aligned with real world industry needs.



### Strategic Positioning

- These efforts reflect NABIP's evolution into a national learning platform, with the NABIP Learning Institute serving as the central hub for certification, workforce development, and industry advancement.

# OPERATIONAL EXCELLENCE

Education excellence + workforce development

## STRATEGY & INNOVATION

### Building the infrastructure for the next era of NABIP growth

Q1 reflected strong progress in innovation, infrastructure, and organizational alignment—positioning NABIP for long-term growth and enhanced member value.

#### Innovation & Organizational Progress

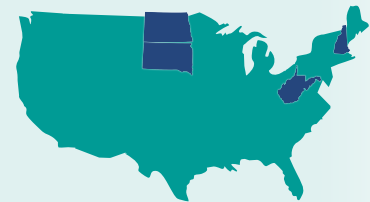
##### Cybersecurity & AI Taskforce Expansion

- Published thought leadership in *Washington Update* and *Weekly Insider*
- Conducted leadership survey and expanded participation in the taskforce
- Hosted LPRT Masterclass



##### Chapter Revitalization Efforts

- Focused support underway in West Virginia, New Hampshire, and the Dakotas
- Strengthening local engagement and operational stability



##### AMS Modernization Progress

- Selection process completed; fundraising efforts are underway
- Expected to significantly enhance:
  - Chapter financial management
  - Website capabilities
  - Member experience

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[nabipfoundation.org/donate](https://nabipfoundation.org/donate)



##### Annual Convention

- Developed five professional development tracks to deliver targeted learning opportunities for attendees
- Introduced a new Policy & Compliance track to expand educational offerings and address emerging industry needs



**Impact:** These initiatives strengthen NABIP's operational infrastructure, expand innovation capacity, and improve the member experience—laying the groundwork for scalable growth.

# INFLUENCE & IMPACT

Policy leadership + national visibility + member engagement through communications

## GOVERNMENT RELATIONS & ADVOCACY

### Influence in action at the federal and state levels

Q1 delivered major advocacy wins and elevated NABIP's presence at the highest levels of policymaking.

#### Highlights

##### Capitol Conference Success



**669 members**  
participated in 354  
Capitol Hill meetings



**200+**  
first-time  
attendees



**More than 40**  
Members of Congress  
attended PAC breakfast



##### Regulatory Wins

#### Rollback of Medicare marketing restrictions, including:

- Elimination of 48-hour SOA waiting period
- Increased flexibility for marketing & education events
- Reduced compliance burdens



##### Legislative Impact

#### Key provisions supported in the Consolidated Appropriations Act of 2026, including:

- PBM transparency and rebate pass-through
- Medicare site-neutral payment policies
- Strengthened No Surprises Act protections



##### Federal Engagement

#### Letters and testimony submitted to HHS and Congress on:

- Medicare market reforms
- ACA regulations
- PBM reform and fraud prevention



# INFLUENCE & IMPACT

Policy leadership + national visibility + member engagement through communications

## PAC

Region:	Qtr 1	Count of Donors from Region
(R 1) Total Donated	\$6,878.00	18
(R 2) Total Donated	\$7,742.00	82
(R 3) Total Donated	\$18,759.00	126
(R 4) Total Donated	\$10,063.50	60
(R 5) Total Donated	\$15,683.00	105
(R 6) Total Donated	\$22,871.26	138
(R 7) Total Donated	\$16,214.00	87
(R 8) Total Donated	\$26,617.50	141

**Total Contributions: \$124,828.26      Total Number of Donors for Q1: 757**

**Impact:** NABIP continues to drive meaningful policy outcomes—protecting agent compensation, improving market integrity, and strengthening consumer protections.

## COMMUNICATIONS, PUBLIC RELATIONS & MARKETING

### National visibility, strategic messaging, and digital growth

NABIP's communications engine delivered exceptional reach and engagement in Q1—amplifying advocacy and reinforcing broker value.

#### Media & Public Relations

7 press releases (Jan–Mar)

Nearly 400 media placements across top-tier outlets

#### Coverage included:

- Yahoo Finance
- Associated Press
- STAT
- National broadcast affiliates



STAT

[Click to see now](#)

#### Publication & Campaigns

Published [Winter and Spring 2026 bip Magazine](#)

#### Advanced major campaigns:

- [Broker Voices](#)
- [Ask1, Add1 membership campaign](#)
- [LPRT promotional campaign](#)



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# INFLUENCE & IMPACT

Policy leadership + national visibility + member engagement through communications

## Digital Performance (Q1 2026)

- 534** social posts
- 5,137** reactions
- 765** new followers



## Email Marketing Performance

- Open rate ranged from **30%–44%**
- Top-performing category:**
  - Capitol Conference emails (44% open, 8% click)

**Impact:** These efforts significantly expanded NABIP’s national visibility, strengthened member engagement, and reinforced the organization’s role as a leading voice in healthcare policy.

# FINANCIAL VITALITY

Membership growth + sustainability + budget discipline

## MEMBERSHIP GROWTH & ENGAGEMENT

### Expanding our reach, strengthening engagement, and building future pathways

NABIP continued to build a strong membership foundation in Q1 2026—driving new member growth, expanding agency participation, and advancing new pathways for the next generation of professionals.

### Expanding our reach, strengthening engagement, and building future pathways

- 574** new members joined NABIP in Q1
- 20** new agencies joined through the Agency Dues Model program
- 21** chapters leveraged promotional membership campaigns to drive recruitment

### Chapters Activation & Growth Initiatives

- Successful use of the **“\$50 off annual dues or one month free”** campaign during chapter events
- Continued collaboration with chapters to strengthen local engagement and recruitment efforts

**ADM – For Agencies Between 2 & 100 Enrollees**

ADM is available to agencies of two to 100, which enroll 100 percent of EAMs. It offers one payment per month based on agency size, one renewal date and the agency owns the slots.

Agency Size	2-3	4-7	8-10	11-18	19-24	25-39	40-50	51-74	75-100
2025 Monthly Base*	\$65	\$100	\$240	\$300	\$430	\$750	\$850	\$1,700	\$3,100

**Note:** Agencies with members in the chapters listed below are subject to an additional fee to support the chapter’s advocacy efforts. This adjustment is set on pro-rata basis.

30% Geographical Adjustment	30% Geographical Adjustment	40% Geographical Adjustment
Local Chapters Atlanta, GA Louisville, KY Raton, NM Springfield, MO Dallas, TX Houston, TX San Antonio, TX Wichita Falls, TX	State Chapters Massachusetts Minnesota New York North Carolina West Virginia	All Connecticut All Florida All California

\*EAMs are agency staff who are health-related positions: the employee benefits, individual health insurance, and Medicare or both as account managers or all comparable professionals with clients. Employees focused solely on the financial or security and quality insurance are excluded. All EAMs receive NABIP membership benefits under the local agency’s dues model.  
\*Includes all local, state and national dues.

## New Membership Structure

### New membership tiers finalized:

- Student Membership Tier
- Newly Licensed / New Agency Owner Tier

### Principal Council structure under review

- Updates to levels and benefits planned for Q2 and beyond



**Impact:** These efforts are strengthening NABIP's membership pipeline by expanding entry points, increasing chapter-level engagement, and modernizing membership offerings —positioning the association for sustained growth and increased member value in 2026.

## Q1 2026 FINANCIAL PERFORMANCE

### Managing early-year pressures while investing in future growth

NABIP's Q1 financial performance reflects the realities of early-year timing, strategic investments, and event-related expenses, while maintaining disciplined cost management and a clear path forward.

### Financial Snapshot (January - March)

**Operating Loss:** (\$84,026)

**Variance to Budget:** (\$272,875) below plan

**Total Revenue:** \$1,263,064

**Total Expenses:** \$1,334,774

**While performance is below budget,** both revenue and expenses tracked under projections, reflecting proactive cost management alongside slower-than-expected revenue timing.

### Key Drivers

**Impact:** NABIP continues to strengthen transparency and member engagement by providing monthly financial reports online, giving members greater visibility into the association's financial performance. Here is the link: <https://nabip.org/who-we-are/financial-update>

#### Revenue Timing Gaps

- Program service revenue underperformed by ~\$183K
- Driven by timing across:
  - Professional Development
  - Sponsorship

#### Strategic Investment Cycle

- Capitol Conference expenses impacting early-year cash flow
- Continued investment in programs, infrastructure, and growth initiatives

#### Expense Management

- Expense remained below budget
- Focus on maintaining operational efficiency while supporting core priorities

#### Cash Flow & Near-Term Considerations

- Year-to-date cash flow: negative (\$491,515)
- Event-related costs contributing to short-term pressure
- Foundation support may be required to advance the AMS implementation

**With strong cost controls in place and revenue expected to normalize in the coming months, NABIP remains focused on strengthening financial performance while continuing to invest in the programs, advocacy, and infrastructure that drive long-term member value.**

## CONTACT US

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