



A MESSAGE FROM THE PRESIDENT

As I begin my term as president of the National Association of Benefits and Insurance Professionals, I am honored to serve an organization with a proud legacy of advocacy, leadership, and service.

The second quarter of 2026 marked an exciting period of progress for NABIP. From important advocacy achievements and record-breaking professional development programs to a successful Annual Convention and expanded national visibility, the accomplishments highlighted in this report demonstrate the value NABIP delivers to our members and the consumers they serve.

These accomplishments also set the stage for what comes next.

My leadership theme, **Forward Together**, reflects our commitment to building on NABIP's 96-year legacy while preparing the association for its next century of leadership. Together, we will continue advancing policies that protect our profession, expanding professional development, strengthening our chapters, enhancing member value, and ensuring licensed health insurance agents and brokers remain the trusted advisors consumers rely on every day.

None of this would be possible without the dedication of our members, volunteer leaders, partners, and staff. Thank you for your continued commitment to NABIP and to the profession we proudly represent.

I invite you to see how we are moving **Forward Together** to strengthen our association, empower our members, and shape the future of healthcare.

Mychal H. Walker, Sr.
President, NABIP

Mychal Walker



Q2 2026 BY THE NUMBERS

Membership & Professional Development

-  **126% increase** in Medicare Certification enrollment
-  **160% increase** in Medicare Certification revenue
-  **286% increase** in FMO and carrier partner participation
-  **41 professionals** earned their Healthcare Fiduciary Certification
-  **181** new REBC graduates recognized
-  **608** new members welcomed
-  **8** new Agency Dues Model agencies added



Advocacy & PAC

-  **8 Operation Shout** campaigns launched
-  **Nearly 1,300** messages sent to policymakers
-  **716** members contributed to NABIP PAC
-  **More than \$115,000** was contributed to NABIP PAC



Annual Convention



Nearly 650
Annual Convention
attendees



Approximately 150
first-time Convention
attendees



114 member and
chapter awards
presented



Communications & Visibility

- 15 press releases issued
- More than 250 media placements generated
- More than 70 members joined the Media Response Team
- 720 social media posts published
- 5,764 social media reactions generated
- 692 new social media followers gained



Financial Stewardship

- \$157,067 operating net profit
- \$219,148 positive Q2 cash flow



ADVOCATING FOR OUR MEMBERS. DELIVERING RESULTS.

Advocacy remains one of the most important benefits of NABIP membership. During the second quarter, NABIP brought members and policy experts directly into discussions with Congress and federal agencies, ensuring the broker voice was represented as healthcare legislation and regulations were developed.

Congressional Advocacy

NABIP directly engaged members of Congress and congressional staff on issues affecting the profession and the consumers and employers our members serve.

- Mobilized opposition to legislation introduced by Rep. Alexandria Ocasio-Cortez that would have imposed new compensation limits on agents serving Medicare beneficiaries.
- Met with the offices of Sens. Todd Young, Andy Kim, and Mark Kelly to address small-business and employer-sponsored coverage issues.
- Brought Medicare Advisory Group members into discussions with the Senate Finance Committee and Reps. Michael Rulli, Bob Latta, and Randy Weber.
- Connected members of NABIP's Mental Health Working Group with Senate Health, Education, Labor and Pensions Committee staff.
- Continued advocating before members serving on key committees, including Senate Finance, Senate HELP, Senate Aging, and House Energy and Commerce.



Federal Agency Engagement

NABIP continued working with CMS, CCIIO, MedPAC, and other federal health-policy officials to ensure agents and brokers are considered in regulatory decisions.

- Helped shape final ACA Marketplace and Medicare regulations through [formal comments](#) and ongoing engagement with federal agencies.
- Participated in quarterly agent-association meetings with CMS and CCIIO.
- Brought members of the Medicare Advisory Group and Individual Market Working Group into direct discussions with federal officials.
- Participated in an onsite ACA agent and broker meeting at CMS headquarters.
- Hosted a [member webinar](#) on the latest ACA Marketplace regulations following meetings with CCIIO.
- Worked closely with MedPAC throughout development of its [June 2026 Report to the Congress: Medicare and the Health Care Delivery System](#), helping ensure a more balanced portrayal of the important role licensed agents and brokers play in assisting Medicare beneficiaries. The report also **acknowledged the contributions of NABIP's Michael Andel and Nicole LePetri.**
- Supported NEW CMS efforts to gather [information](#) from Medicare carriers about plans that do not pay agent commissions, reinforcing NABIP's advocacy for beneficiary access to licensed agents and brokers.
- Advanced advocacy for pharmacy benefit manager (PBM) reform, including providing congressional [testimony](#) on proposed broker compensation disclosure requirements.



NABIP's Michael Andel and Nicole LePetri were acknowledged by MedPAC for providing insights and assistance during development of its June 2026 Report to Congress.

Grassroots Engagement

NABIP mobilized members nationwide to communicate directly with policymakers and demonstrate the strength of the broker voice.

- Launched eight [Operation Shout](#) campaigns, including three national campaigns and five state campaigns.
- Generated nearly **1,300 messages** to federal and state policymakers.
- Mobilized members to support the [Transparency in Billing Act of 2026](#).
- Mobilized members to oppose proposed Medicare agent compensation limits.
- Supported advocacy efforts to address healthcare affordability in the ACA Marketplace.
- Advanced state legislative priorities affecting licensed agents and brokers, employers, and consumers.



Strengthening NABIP's Political Voice

NABIP members and chapters continued demonstrating strong support for NABIP PAC during the second quarter.

- Between April 1 and June 30, **716 members** across all eight regions contributed \$115,924.
- Region 6 led the way with \$21,493.68, followed by Region 3 with \$20,489 and Region 8 with \$20,418.
- Members contributed \$31,550 during Annual Convention.
- The limited-edition souvenir pin celebrating America's 250th birthday generated \$15,250 in contributions.
- Forty-six chapters contributed a combined \$51,275 supporting NABIP PAC's Administrative Fund.
- NABIP Orange County led chapter giving with \$6,000, followed by NABIP Metro Detroit, NABIP California, NABIP San Diego, and NABIP Houston.



IMPACT: NABIP's advocacy ensures the voice of licensed agents and brokers is heard where healthcare policy is shaped, protecting the profession while advancing policies that preserve consumer choice, affordability, and access to trusted professional guidance.

INVESTING IN OUR MEMBERS AND THE FUTURE OF THE PROFESSION

Helping members succeed remains central to NABIP's mission. During the second quarter, NABIP continued expanding education, certifications, professional designations, and workforce development opportunities while welcoming new members and strengthening the profession.

Medicare Certification Sets a New Record for Growth

NABIP's PY2027 Medicare, Medicare Products & FWA Certification achieved its strongest launch to date, reflecting growing demand for high-quality, broker-focused Medicare education and expanding FMO and carrier participation.

- Enrollment **increased 126%** compared with the PY26 launch period.
- Revenue **increased 160%**.
- FMO and carrier partner participation **increased 286%**.
- Accepted by **80 Medicare carriers**, including UnitedHealthcare, Aetna, Elevance Health, and Humana.



New Medicare Certification Program is Here

Written by Brokers, for Brokers



Scan Today
to Register!



STRATEGY & INNOVATION

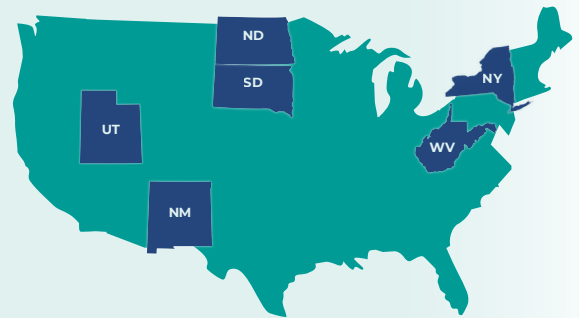
Strengthening Chapters. Enhancing Member Value. Building for the Future.

NABIP continued strengthening chapters and modernizing its technology to improve the member experience and support long-term growth.

Chapter Development & Leadership

Continued chapter revitalization efforts in **North Dakota, South Dakota, West Virginia, New Mexico, Utah, and New York.**

Added updated leadership guides, training videos, and online resources to the **[Leadership Training](#)** section of the NABIP website.



Technology and Member Experience

Advanced implementation of NABIP's new **Association Management System.**

- The new platform will allow members to update payment information, manage their profiles, select areas of interest, and access expanded self-service features.

re:members

IMPACT: Investments in stronger chapters, modernized technology, and an improved member experience are building a more connected and accessible NABIP while creating the infrastructure needed to serve members and support the association's long-term growth.

ANNUAL CONVENTION DELIVERS EXCEPTIONAL VALUE

Nearly 650 professionals gathered at the 2026 Annual Convention for four days of education, networking, business development, and celebration of the profession.

Welcomed nearly **650 attendees**, including approximately **150 first-time attendees.**



NABIP Learning Institute Expands Professional Development

The NABIP Learning Institute continued developing as the unified home for NABIP's education, certification, and workforce development initiatives.

Building on the success of its inaugural [Healthcare Fiduciary Certification](#) cohort, NABIP launched the second Healthcare Fiduciary Certification Webinar Series in July, expanding access to this innovative professional development program. From April through June, 41 professionals earned their Healthcare Fiduciary Certification, demonstrating growing interest in this new credential.



NABIP expanded its workforce development through its partnership with the [Benefits Advisor Network](#), creating new opportunities to deliver group-benefits education to agency professionals.

Recognized 181 new [Registered Employee Benefits Consultant](#) graduates during the 2026 Annual Convention.



Growing and Strengthening Our Membership

NABIP continued growing and strengthening the nation's leading community of health insurance agents, brokers, and employee benefits professionals. Each new member expands NABIP's collective expertise, strengthens the broker voice, and increases opportunities for advocacy, education, networking, and leadership.

Welcomed **608 new members**, expanding NABIP's national network and strengthening the association's collective voice.

Added **eight new Agency Dues Model agencies**, making it easier for firms to invest in their professionals and provide access to NABIP's advocacy, education, networking, and member benefits.

Launched the [Ask 1, Add 1 membership campaign](#), encouraging every member to invite one colleague to join NABIP and help strengthen the profession.

Supported membership recruitment events hosted by 31 chapters, where eligible new members received either \$50 off national annual dues or one month of free dues when paying monthly.



IMPACT: By expanding professional development, strengthening industry partnerships, and growing our membership, NABIP is equipping benefits professionals with the knowledge, credentials, connections, and collective voice they need to succeed in a rapidly changing healthcare marketplace.

- Featured nationally recognized General Session speakers and five professional development tracks covering artificial intelligence, GLP-1 therapies, pharmacogenomics, healthcare policy, fiduciary responsibility, mental health, and other emerging industry topics.
- Received more than 1,500 session and event evaluations, with an overall attendee **satisfaction rating of 4.3 out of 5.**
- Expanded and sold out the Exhibit Hall, exceeding revenue goals by more than \$20,000 while increasing exhibitor participation and non-dues revenue.
- Opened early registration for the **2027 Annual Convention** in Salt Lake City, generating strong early participation.
- Recognized excellence across the profession by presenting 114 awards and honoring **Bruce Benton with the Harold R. Gordon Memorial Award**, NABIP's highest individual honor.



“
Content-wise, this was one of the best Annual Conventions I have attended in the past several years.
 ”



IMPACT: Annual Convention brings the profession together to learn, build relationships, exchange ideas, and prepare for what's next, while creating new opportunities for members to grow their businesses and strengthen their connection to the NABIP community.

AMPLIFYING THE BROKER VOICE

Communications, Public Relations and Marketing

Strategic communications, public relations, marketing, and digital engagement continued to elevate the broker voice while increasing NABIP's visibility, supporting key initiatives, and strengthening member engagement.

Public Relations

- Issued 15 **press releases**, generating more than 250 media placements, including coverage in *The Wall Street Journal*, *Forbes*, *Yahoo Finance*, *AARP*, and numerous leading insurance and healthcare trade publications.
- Launched NABIP's **Media Response Team**, resulting in member-sourced stories appearing in national media.



Digital Marketing & Member Engagement

- Published **720 social media posts**, generating 5,764 reactions and 692 new followers.
- Supported the **Annual Convention with 151 social media posts**, generating 1,858 engagements and promoting convention programming, speakers, exhibitors, sponsors, award recipients, and registration for the 2027 Annual Convention.
- Distributed **85 member and stakeholder emails**, achieving open rates ranging from 32% to 47%, with member announcements generating the highest engagement.
- Launched ***The Benefits Brief* podcast** at Annual Convention, expanding opportunities to educate members, showcase industry leaders, and elevate the broker voice.

720 social media posts published

1,858 engagements supporting Annual Convention

85 member and stakeholder emails



Strategic Marketing Campaigns

- Launched the communications campaign supporting NABIP's **Ask 1, Add 1 membership initiative**.
- Developed a comprehensive marketing campaign and toolkit for NABIP's **2027 Medicare Certification**, supporting agents, agencies, FMOs, carriers, chapters, and strategic partners.
- Supported the launch of the **Healthcare Fiduciary Certification** through targeted marketing and promotional campaigns.
- Advanced the **Brokers Making a Difference** campaign, highlighting the value licensed agents and brokers bring to consumers and the healthcare system.



Publications & Thought Leadership

- Published the Spring and Summer 2026 editions of ***bip* magazine**, earning finalist recognition for **Publication of the Year** and **Best Nonprofit Publication** in two national awards programs.



IMPACT: Expanded national media visibility strengthens NABIP's voice, elevates members as trusted industry experts, and increases awareness of the critical role licensed agents and brokers play in helping consumers navigate healthcare.

FINANCIAL STEWARDSHIP

NABIP maintained a positive operating position during the second quarter while continuing to invest in long-term financial stability and member value.

- Generated an operating net profit of \$157,067, finishing \$32,848 below budget.
- Recorded total revenue of \$1,424,363 and total expenses of \$1,247,498.
- Program service revenue was \$203,164 below budget.
- Generated positive Q2 cash flow of \$219,148, while year-to-date cash flow remained negative at \$272,367.
- Transferred \$60,000 to UBS investment and reserve accounts to support long-term financial stability.



IMPACT: Disciplined financial management allows NABIP to invest in member priorities today while strengthening the association's financial foundation and capacity to serve the profession for the future.

LOOKING AHEAD

The momentum built during the second quarter provides a strong foundation for NABIP's Forward Together agenda. In the months ahead, the association will continue advancing advocacy priorities, expanding professional development, strengthening chapters, modernizing the member experience, and elevating the voice of licensed health insurance agents and brokers.

NABIP will also continue advancing its [Healthcare Bill of Rights](#) through advocacy, education, and collaboration with policymakers and industry leaders—promoting affordable, accessible, high-quality healthcare while protecting consumer choice and preserving the vital role of licensed agents and brokers.

THE FOUNDATION FOR FORWARD TOGETHER

Guided by the NABIP Strategic Framework

The accomplishments highlighted throughout this report reflect the priorities of NABIP's Strategic Framework. By strengthening advocacy, expanding education, increasing member value, and investing in operational excellence, NABIP is building the foundation needed to move **Forward Together**.



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