2022
House of Delegates
Handbook

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92nd Annual Convention
June 26-June 28, 2022
Dear Delegates:

Welcome to the 92nd Annual NAHU Convention. As a voting delegate you carry the responsibility for shaping our association's leadership, policies, and future direction.

The delegate credentialing and voting procedures are below. Please read them carefully and contact Brooke Willson if you have any questions. If you are an alternate delegate, you will not credential until notified by your chapter. You will find the alternate credentialing process here (http://nahu.org/media/5377/alternate-delegate-credentialing-process-2020.pdf).

**CREDENTIALING PROCESS FOR APPOINTED DELEGATES**

1. When you were appointed to be a delegate by your chapter, your membership status was checked by NAHU. NAHU's Bylaws specify that only members in good standing may be delegates.

2. To receive your access to the House of Delegates, you must credential here (link to registration) at your earliest convenience. **Credentialing will close at 1 pm (ET)/12 pm (CT)/11 am (MT)/10 am (PT) on Monday, June 27.**

3. To credential you will be required to provide the following information.
   
   NAME: (LAST FIRST)
   MEMBERSHIP NUMBER: (ID)
   APPOINTED CHAPTER: (APPOINTED CHAPTER)
   DELEGATE STATUS: (POSITION)

   This information was emailed to you on Monday, June 6.

4. When your credentialing request is received by NAHU, it is reviewed and, if everything is in order, approved. Upon approval you will receive an email with voting information. **Your voting link is unique to you. NAHU is not able to replace the link or generate a new link.**

5. The voting process is being managed by Simply Voting, Inc., a full-service provider of secure, hosted online elections.

   To ensure maximum email deliverability, we are requesting all delegates to add Simply Voting to your safe senders lists. All emails will originate from vote@simplyvoting.com and from one of the following domains:
   - simplyvoting.com
   - o3.email.simplyvoting.com

**VOTING**

Voting for the proposed bylaws amendment will take place in the House of Delegates. The House of Delegates is on **Tuesday, June 28, and will start at 10:45 am (ET)/9:45 am (CT)/8:45 am (MT)/7:45 am (PT).**

Please note that the business of the House of Delegates may require the session to be extended beyond the scheduled end time. Delegates are asked to stay until the end of the session, as NAHU bylaws preclude voting
by proxy, and alternate delegates, who would replace a delegate unable to fulfill his/her obligations, cannot be credentialed after the session starts. If you leave the session, your chapter loses the right to exercise your vote.

Thank you again for participating in the House of Delegates and for your continued support of NAHU.
1) At the beginning of the House of Delegates, the Chair will ask for approval of these Standing Rules of Order. A majority (more than half of the votes cast) is needed to approve the Standing Rules of Order.

2) The most current edition of *The Standard Code of Parliamentary Procedure* (formerly known as “Sturgis”) will govern the House in all cases in which they are applicable and in which they are not inconsistent with the Bylaws of NAHU, and these Standing Rules of Order.

3) At the first General Session the Nominations Committee will file its report after which nominations from the floor will be in order. Nominations will then be closed. Those members seeking nationally elected positions which are being challenged will have a set amount of time to present themselves and/or any member endorsements before the General Session. The length of time, which shall be no less than two minutes, will be determined and communicated to the candidates no later than six weeks prior to the Annual Convention.

4) At the opening of the House of Delegates session, the Secretary shall report the number of eligible delegates allowed to vote at the House. Members of the current Board of Trustees and Past National Presidents vote as delegates but are not counted within their local or state chapters. Their votes will be counted separately.

5) The Chair may appoint a parliamentarian for the House of Delegates.

6) The Nominations Committee’s report will be communicated to the chapters no later than sixty days prior to Annual Convention. Elections for any contested executive officers or contested Regional Vice President will occur in the House of Delegates. Contested officer elections shall be conducted by written ballot.

7) The Election Committee shall consist of the chairperson, who shall be the Immediate Past President, and regional members of the committee, who shall be one each from their respective region appointed by the Regional Vice President and approved by the entire Board of Trustees. They shall be members in good standing of NAHU. They shall not be currently running for office. If such should occur, his or her name should be withdrawn, and the appropriate Regional Vice President will replace their name with another member in good standing.

8) Candidates may appoint one official Observer on their behalf who may attend the tabulation of the ballot votes but shall not participate in the actual count. The Observer may not be the candidate, another candidate, or an officer. In the event the Observer believes there is a discrepancy in the tabulation the Election Committee shall recount. No further complaint shall be in order by the Observer following the recount and agreement of the Election Committee as to its accuracy. The Election Committee chairman shall sign the report attesting to its accuracy.

9) Bylaw amendments and resolutions shall be read by the Secretary twice prior to any vote. The first reading will be prior to debate on the amendment or resolution. The final reading will be just prior to the vote on the amendment or resolution and will contain any amendments or changes approved by the House of Delegates.

10) Speakers will be allowed two minutes to speak on an issue. The Chair shall recognize a maximum number of three speakers for and three speakers opposed to each issue. The Chair may choose to allow more than three speakers on a particular topic, at his discretion. A timekeeper will be appointed by the Chair.
11) All reports, amendments to qualified bylaw amendments, or resolutions shall be presented to the Secretary in written form before being presented to the House of Delegates.

12) At the end of the time allotted for debate on a question before the House, a voice or standing vote will be taken. Any delegate may ask the Chair for a recorded vote. If such vote is requested, the Chair shall ask each State President (or representative thereof) to record the votes for their state and report said votes to the Secretary when the state's name is called in a roll call vote.

13) Once the House of Delegates has finished the business of the day, the President will swear in the President-Elect as the new President of NAHU. The newly installed President will then swear in the newly elected Officers and Regional Vice Presidents of NAHU and may then address the House of Delegates as President. At the conclusion of his speech, the new President may adjourn the House of Delegates.
Call to Order

Adoption of Credentials Report (Majority)

Adoption of Standing Rules of Order (Majority)

Adoption of Proposed Agenda (Majority)

Report on the Minutes of 2021 House of Delegates

Report of Board of Trustees (BoT)

Report on Financials

Report of the Benchmarking Taskforce

Adoption of Proposed Bylaws Amendments Proposals (Two-third 2/3)
  - Combining the Nominations Committee and the Elections Committee
  - NAHU Name Change

Past President’s Remarks

Presentation of President’s Pin and Gavel

Swearing in of 2022-2023 President

Installation of 2022-2023 Board of Trustees

Remarks of Incoming President
PROPOSED BYLAWS AMENDMENT #1

Combining the Nomination Committee and the Elections Committee

The Board of Trustees recommends that the Nomination and Election Committees be combined effective July 1, 2022, to allow for better continuity of the nomination and election process. The new name shall be the Nominations and Election Committee as demonstrated in the proposed amendment below.

RATIONALE FOR THIS PROPOSED CHANGE

The purpose for this change is to streamline efficiencies among the two committees to better support NAHU’s nomination and election purpose and align with the strategic direction of NAHU.

Article X, Nominations and Elections currently reads as follows:

Section 1. Nominations

A. The Nominations Committee shall consist of the Chairperson and two (2) additional members. The Chairperson of the Nominations Committee shall be the Immediate Past President or the appointee of the President fulfilling the duties of that office for its unexpired term. The Vice-Chairperson shall be the President-Elect or the appointee of the President fulfilling the duties of that office for its unexpired term. The third member shall be a past NAHU President, who is appointed by the Nominations Committee Chairperson.

B. The role and responsibility of the Nominations Committee shall be to compile a list of candidates for the various offices to be filled at the Association's annual meeting. As a part of its responsibilities, the committee shall mail its report to the Secretary not less than ninety (90) days prior to the annual meeting of the association. Not less than seventy-five (75) days prior to the annual meeting, the Secretary shall postal mail or electronic mail a copy of the report to the President and Secretary of each state and local association. In addition, the report of the Nominations Committee will be published in the association's magazine prior to the annual meeting.

C. A member's name may be presented to the Nominations Committee or the NAHU Board of Trustees, for consideration as a nominee by any member of the Nomination Committee, or by written notice from any state and local association accompanied by a statement signed by the nominee that he/she is willing and able to serve if nominated and elected. In the event that no members are nominated for a position, the Board of Trustees may nominate a candidate. Nominations may not be made by individual members, except as allowed in Section D below.

D. Additional nominations outside of the Nominations Committee may be made by written notice from the Boards of Directors of at least three (3) state and local associations, addressed to the Secretary of the association, which must be received not less than thirty (30) days prior to the annual meeting. The Secretary shall publish such additional nominations and mail them to the state and local associations not less than twenty-five (25) days prior to the annual meeting.
E. With the exception of Immediate Past President and President, additional nominations for executive officers or Regional Vice Presidents may be made from the floor of the convention while nominations are open for a particular office. In order to qualify, the nominator must present to the Secretary no less than twenty-four (24) hours before the opening of the floor for nominations a petition containing a minimum number of different state and local associations as described below, along with a signed statement by the nominee that he or she is willing and able to serve if elected.

i. For an office which is voted on by all delegates, the minimum number of valid signatures shall be twenty-five (25) percent of the registered delegates in attendance at the annual meeting, and those signatures must be from a minimum of ten (10) different state and/or local member associations from at least five (5) different states must be represented by those signatures.

ii. For an office which is voted on by delegates from a certain geographic region, the minimum number of valid signatures shall be twenty-five (25) percent of the registered delegates from that region in attendance at the annual meeting representing a minimum of three (3) different state and/or local member associations from at least two (2) different states within that region.

F. The Nominations Committee will determine the number and duration of nominating speeches for all candidates and all offices, with a minimum of two (2) minutes allowed per candidate.

Section 2. Elections

A. The Election Committee shall consist of the chairperson, who shall be the Immediate Past President, and regional members of the committee, who shall be one each from their respective region appointed by the Regional Vice President and approved by the entire Board of Trustees. They shall be members in good standing of NAHU. They shall not be currently running for office. If such should occur, his or her name should be withdrawn and the appropriate Regional Vice President will replace their name with another member in good standing.

B. The responsibilities of the Election Committee shall include:

i. The adoption of procedures for credentialing delegates to vote for offices;

ii. Reporting to the House of Delegates on the number of delegates who have been credentialed and the meeting of necessary quorum for the House of Delegates to conduct business; and

iii. To supervise all ballot votes and tabulating and reporting the results of all votes.

C. The nominees for each office receiving a majority of the votes cast shall be declared elected. An additional vote shall be taken if no candidate receives the necessary majority for election. The two (2) candidates receiving the most votes (or more in the case of a tie) on the first ballot shall be the only names on the additional ballot or ballots.

If adopted Article IX, Section 2 will read:

Changes that are additional to the current bylaws are indicated in bold and CAPITALS. Any deletions to the current bylaws are indicated in bold and strikethrough. Rational for change is addressed in italics. Section or items that experience no changes are not included in this review.

Section 1. Nominations AND ELECTIONS COMMITTEE
A. The Nominations Committee shall consist of the Chairperson, VICE CHAIRPERSON and two (2) NINE (9) additional members. The Chairperson of the Nominations AND ELECTIONS Committee shall be the Immediate Past President or the appointee of the President fulfilling the duties of that office for its unexpired term. The Vice-Chairperson shall be the President-Elect or the appointee of the President fulfilling the duties of that office for its unexpired term. The third member shall be a past NAHU President, who is appointed by the Nominations Committee Chairperson.

The third member shall be a past NAHU President, who is appointed by the Nominations AND ELECTIONS Committee Chair AND THE REMAINING EIGHT (8) SHALL BE REGIONAL MEMBERS, WHO SHALL BE ONE EACH FROM THEIR RESPECTIVE REGION APPOINTED BY THE REGIONAL VICE PRESIDENT AND APPROVED BY THE BOARD OF TRUSTEES.

MEMBERS OF THE NOMINATIONS AND ELECTIONS COMMITTEE SHALL NOT BE CURRENTLY RUNNING FOR OFFICE. IF SUCH SHOULD OCCUR, HIS OR HER NAME SHOULD BE WITHDRAWN AND REPLACED BY THE PRESIDENT OR THE APPROPRIATE REGIONAL VICE PRESIDENT WITH ANOTHER MEMBER IN GOOD STANDING.

B. The role and responsibility of the Nominations AND ELECTIONS Committee IN REGARDS TO NOMINATIONS, shall be to compile a list of candidates for the various offices to be filled at the Association's annual meeting. As a part of its responsibilities, the committee shall mail its report to the Secretary not less than ninety (90) days prior to the annual meeting of the association. Not less than seventy-five (75) days prior to the annual meeting, the Secretary shall postal mail or electronic mail a copy of the report to the President and Secretary of each state and local association. In addition, the report of the Nominations AND ELECTIONS Committee will be published in the association's magazine prior to the annual meeting.

C. A member's name may be presented to the Nominations AND ELECTIONS Committee or the NAHU Board of Trustees, for consideration as a nominee by any member of the Nomination AND ELECTIONS Committee, or by written notice from any state and local association accompanied by a statement signed by the nominee that he/she is willing and able to serve if nominated and elected. In the event that no members are nominated for a position, the Board of Trustees may nominate a candidate. Nominations may not be made by individual members, except as allowed in Section D below.

D. Additional nominations outside of the Nominations AND ELECTIONS Committee may be made by written notice from the Boards of Directors of at least three (3) state and local associations, addressed to the Secretary of the association, which must be received not less than thirty (30) days prior to the annual meeting. The Secretary shall publish such additional nominations and mail them to the state and local associations not less than twenty-five (25) days prior to the annual meeting.

E. With the exception of Immediate Past President and President, additional nominations for executive officers or Regional Vice Presidents may be made from the floor of the convention while nominations are open for a particular office. In order to qualify, the nominator must present to the Secretary no less than twenty-four (24) hours before the opening of the floor for nominations a petition containing a minimum number of different state and local associations as described below, along with a signed statement by the nominee that he or she is willing and able to serve if elected.

i. For an office which is voted on by all delegates, the minimum number of valid signatures shall be twenty-five (25) percent of the registered delegates in attendance at the annual meeting, and
those signatures must be from a minimum of ten (10) different state and/or local member associations from at least five (5) different states must be represented by those signatures.

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F. The Nominations AND ELECTIONS Committee will determine the number and duration of nominating speeches for all candidates and all offices, with a minimum of two (2) minutes allowed per candidates.

Section 2. Elections

A. The Election Committee shall consist of the chairperson, who shall be the Immediate Past President, and regional members of the committee, who shall be one each from their respective region appointed by the Regional Vice President and approved by the entire Board of Trustees. They shall be members in good standing of NAHU. They shall not be currently running for office. If such should occur, his or her name should be withdrawn and the Regional Vice President will replace their name with another member in good standing.

A. The responsibilities of the NOMINATIONS AND Election Committee, IN REGARD TO ELECTIONS, shall include:

i. The adoption of procedures for credentialing delegates to vote for offices;

ii. Reporting to the House of Delegates on the number of delegates who have been credentialed and the meeting of necessary quorum for the House of Delegates to conduct business; and

iii. To supervise all ballot votes and, tabulating and reporting the results of all votes.

B. The nominees for each office receiving a majority of the votes cast shall be declared elected. An additional vote shall be taken if no candidate receives the necessary majority for election. The two (2) candidates receiving the most votes (or more in the case of a tie) on the first ballot shall be the only names on the additional SUBSEQUENT ballot or ballots.
PROPOSED BYLAWS AMENDMENT #2

NAHU Name Change

The NAHU Board of Trustees moves that the National Association of Health Underwriters (NAHU) change its official name to National Association of Benefits and Insurance Professionals, with the tag line, Shaping the Future of Healthcare, effective January 1, 2023. The name change will be preceded by a branding campaign to ensure that our members, other stakeholders, and the public understand that we have a new name that better reflects our mission and vision. NAHU chapters will be permitted up to three years to change to the new name followed by their location. Chapters who began using a DBA prior to June 28, 2022, may continue to do so, but are encouraged to adopt the new name to ensure cohesiveness of the organization. The Board of Trustees and NAHU staff will assist chapters with sample bylaws, a branding toolkit, and other assistance including financial assistance to facilitate the change where needed.

RATIONAL FOR NAME CHANGE

The proposed name change will address the lack of understanding members, the general public and policymakers at the state and federal level have with the use of the word “underwriters” in NAHU’s current name. The proposed name, National Association of Benefits and Insurance Professionals is more inclusive of the variety of businesses and members that are currently a part of the association as well as those prospective members who may become members in the future.

To navigate this process the Board of Trustees appointed a Name Change Task Force. The task force was made up of members from state and local chapters, from all over the county. The task force identified four areas that need to be addressed:

- Is a name change needed?
- If a name change is needed, why is it needed?
- How would this change impact our legislative and regulatory efforts?
- Would a name change help with membership recruitment?
- How would a name change impact our chapters?

A focus group was held to discuss the pros and cons of a name change. Key leaders including past NAHU presidents, current chapter officers and national committee members were invited to the focus group. Based on the findings from the focus group, 90% were in support of the change. It was determined that the task force should move ahead with researching potential names, the process needed for a successful transition and the impact it would have on the chapters.

Many issues relating to the potential name change were discussed in order to generate potential names for the association:

- What words should be included?
- What words should not be included?
- In what order should the words appear?
- How does the new name better reflect our current mission and vision statement?
- Should there be a tagline or not?
Eventually the task force produced thirty names for consideration. These names were included in a survey which was sent to state and local chapter officers. These surveys narrowed down the list from thirty to three and then to one.

To ensure the name change transition was successful the task force then sent out RFPs (Requests for Proposals) to five PR firms that specialize in branding campaigns and that have specific experience with name changes for non-profit organizations with a legislative and regulatory presence. Four responses were received. The RFPs were reviewed for capabilities, association experience and expense. The selected PR firm demonstrated outstanding capability and success in working with associations that had state and local chapters.

The task force’s proposal for a new name and tag line was vetted by the NAHU Governance Committee and forwarded to the Board of Trustees. The NAHU Board of Trustees has now officially recommended the change in name and is in unanimous support of moving forward with the adoption of the new name during our 2022 House of Delegates meeting in Austin.
At NAHU’s Annual Convention, which will be held this month, delegates from across the country will elect the Board of Trustees that will lead the association for the next year.

Regional vice presidents serve a two-year term; this year, the even-numbered regions are up for election. The slate of candidates is:

**2022-2023 BOARD OF TRUSTEES CANDIDATES**

- **President:** Kelly Fristoe
- **President-Elect:** Eric Kohlsdorf
- **Vice President:** Alycia Riedl
- **Treasurer:** Susan Rider
- **Secretary:** David Smith
- **Region 2**
  - Vice President: Dave Mordo
- **Region 4**
  - Vice President: Shawnee Christenson
- **Region 6**
  - Vice President: Doris Waller
- **Region 8**
  - Vice President: Stephanie Berger
VISION: Our industry continues to change at a rapid pace, which makes it of utmost importance that NAHU and its leaders be willing to go to extraordinary lengths to achieve results that defy all of the assumptions. I believe this can be done by adhering to the eight practical pillars of trust from David Horsager’s book The Trust Edge. I have seen firsthand that when leaders learn to implement these pillars, it produces incredible and fascinating results. As president, I commit myself to these principles and will encourage others to do so also:

Clarity: People trust the clear and mistrust the ambiguous. NAHU’s leaders MUST have clarity.

Compassion: People put faith in those who care beyond themselves. NAHU’s leaders MUST be compassionate.

Character: People notice those who do what is right over what is easy. NAHU’s leaders MUST continue to display impeccable character.

Competency: People have confidence in those who stay fresh, relevant and capable. NAHU’s leaders MUST remain competent when dealing with our industry’s changing climate.

Commitment: People believe in those who stand through adversity. NAHU’s leaders MUST remain vigilant in its commitment to our members, our industry and the consumers we serve.

Connection: People want to follow, buy from and be around friends. NAHU’s leaders MUST continue to connect with other industry professionals, stakeholders and legislators and find synergies and efficiencies along the way.

Consistency: People love to see the little things done consistently. NAHU’s leaders MUST remain consistent in everything we do.
VISION: As fellow members, you know the advocacy NAHU brings to our membership across the country. We have faced and will continue to see adversity. We must build on our past successes and lead into the future. Together, we can equip our local and state chapters to provide a member-driven experience that delivers relevant, demanded and effective tools for our clients. We must continue to improve efficiencies to better capitalize and align efforts, vertically and horizontally, so chapters can efficiently access “member defined” benefits. Equally important, the experience certainly involves a powerful legislative arm that not only reacts to but defines how healthcare will look in the United States tomorrow. We MUST be leaders in this arena!

This philosophy provides a blueprint for everyone and every chapter to become stronger. Having grown through the organization, my perspective remains diligent toward helping our members win and retain business. I’m eager to continue this work as president-elect and build upon our strong foundation to fulfill our vision.

ERIC KOHLSDORF
PRESIDENT-ELECT

BIO: NAHU has been a vital part of Eric’s professional success since joining in 1992. He has owned an independent brokerage in Des Moines, Iowa, since 2007 where he continues to work on behalf of his clients. His first job in our industry was in 1988 as an “actual” home-office underwriter for The Principal Financial Group. He transitioned to working with brokers as an account executive for the Principal and United Healthcare operations in Iowa. In 2000, Eric became an associate at a regional brokerage where he built a clientele until moving out on his own.

Within NAHU, he has served as president of the Des Moines Area AHU and president of the Iowa AHU. Additionally, Eric has done extensive work on the legislative front. His work has earned him both the Iowa and NAHU Distinguished Service Awards. Prior to being elected to the National Board of Trustees, Eric was the chairperson for HUPAC in 2016, when HUPAC broke fundraising goals and saw unprecedented success supporting election winners. Eric now serves as the vice president of the NAHU Board. Previously, he was treasurer and secretary.

Outside of NAHU, Eric has served on the Iowa Healthcare Collaborative, representing the patient experience and advocating for transparency in the healthcare arena. In 2015, Iowa Governor Terry Branstad appointed Eric to the CHIP Board of Iowa, where he was unanimously confirmed by the Iowa Senate. He was subsequently reappointed twice by Governor Kim Reynolds and served as chairperson of the Board from 2016 to 2021.

Eric has been blessed to work in an industry that allows him to serve others, but most important is his role as husband and father. Alongside his wife, Brooke, he has three children. They learned raising children requires partnership. It’s a responsibility that brings joy and humility with hope their children learn by example the importance of giving back.
VISION: My vision for NAHU is that we live and breathe our purpose to Educate, Empower and Engage our members. To realize this vision, we have a lot of work to do. My passion is helping others in our association to attain their goals.

I grew up the child of a proud NAHU member leader, an agent who pulled up his bootstraps and got the work done. He taught me to work hard, serve with passion, love learning and never stop evolving. Now more than ever, we must continue to work, stand and grow together if we want to ensure that our industry and association has a successful future.

Our industry and the people who work in it come from all walks of life and serve many different clients and segments but, in the end, we are all working to help people. NAHU must help us bring our combined strength forward.

NAHU has given back to me in more ways than I could ever express to you in words. Giving back to this community has become a core part of who I am. I commit to you that I will work hard, push hard, play hard and give all that I can to see this association attain its vision.

Our future is bright. The world is changing at a rapid pace. Although that can be overwhelming and hard to get our arms around, it also is EXCITING. I am energized by where we are heading and cannot wait to continue serving our amazing association and members!
VISION:
The past year on the BOT has been truly inspiring, watching our Board work collaboratively to drive association change. As a NAHU member, I believe that our leaders must model the way, inspire a shared vision, challenge the process, enable others to act and encourage the heart.

Leadership means different things to different people. By leveraging the strengths, knowledge and leadership expertise, my diverse team of leaders from across the country must prepare our members for industry changes.

The role of the broker/agent/consultant is critical to the future of employee benefits. The services that we provide and the products we sell will continue to evolve and our role to educate and advocate on behalf of our clients will not go away.

My vision is for NAHU to be the association of choice for all employee benefit professionals. We are just scratching the surface with our capabilities. I believe in leading with consistency, integrity, fairness, humility and transparent communication. I am dedicated to helping NAHU identify and develop future leaders to ensure members are prepared to take on leadership roles that become available—locally, state-wide, regionally and nationally. I believe we need to encourage more collaborative efforts among councils/committees within NAHU to bring the best results to our chapters. My curiosity drives me to ask questions, and learning more about our members and their needs encourages me to look at opportunities through a different lens. The member experience is critical to the future of NAHU. To survive and thrive, we must identify, execute and lead strategic change. Are you ready to help take NAHU to new heights?

BIO: Susan serves as director of compliance and HR consulting for Human Capital Concepts (a broker-friendly PEO). Susan previously worked at Preventia building broker relationships and Gregory & Appel Insurance, where she helped employers align their HR strategies with their total reward strategies for their future workforce.

Susan is regularly asked to speak to the media regarding employee benefits, wellness and human resource topics. She is an instructor for several NAHU certification courses and a national presenter, focusing on leadership, compliance and self-funding topics.

For NAHU, she has served as Professional Development chair, Media chair and Young Agent chair. She routinely submits data for NAHU comment letters. Regionally, she has served as professional development chair, retention chair, young agent chair and media chair. For the Indiana AHU, she has served as legislative chair, president and young agent chair, and on the Day on the Hill Committee. For her local chapter, she has been president, president-elect, secretary and event chair, and served on the Sales Congress Committee.

Projects she has worked on include the ISAHU public/private partnership on collaboration for tobacco cessation change, NAHU’s Mentoring Program, NAHU’s Diversity, Equity & Inclusion Task Force, the NAHU Mental Health Task Force and the HIP 2.0 (Indiana Medicaid Expansion). Susan is adjunct faculty of organizational leadership at IUPUI, on the CE Advisory Council of the Indiana Department of Insurance, prior board member of the Domestic Violence Network and a guild member of Damar Services.

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BIO: David has been an active member of NAHU for 20 years, serving in leadership positions at the local, state and national levels. He has invested heavily in improving professional development and our association’s ability to deliver the best to its members. In his work life, David is senior vice president of eBen, a regional benefits consulting firm and agency, working with over 100 coworkers and associates to change the relationship with our clients by raising their expectations and building lasting partnerships. He is a North Carolina native and has two adult children.

VISION: I am running for secretary of our association because what we do for our clients is a vital partnership for their business and their employees, for their families, and America’s overall health. As members, we are the fiercest voice for the actual payers of healthcare in our country and need to present ourselves in Washington DC and the state capitals as their best advocates. We understand how good ideas become poorly implemented, and our experience can help shape a future where the cost of healthcare becomes as critical as its regulation.

NAHU must remain focused on enhancing the value of membership. We are the elite advocates for our industry and those we serve every day. Understanding that most of us approach our work with a servant’s heart must be clear in our interactions with Congress and regulators.

NAHU must continue to prepare our profession for the next level of knowledge and skills, to adapt to an ever-changing future. During my time, I have been unafraid to do the hard work of writing classes, teaching many folks throughout the country, and thinking about what’s next. What we do with professional development today has incredible significance for you and the new professionals who will join our industry in the years to come.

NAHU must magnify its commitment to building the next generation of leaders—in our businesses, in our industry and in our association. Many of us learned the difficulty of “leading” others as local chapter presidents, chairs of committees, and working with legislators and fellow industry professionals. The generations to come will be ready if our association is committed to helping prepare them with these vital soft skills through training, preparation and mentorship.

NAHU must embrace the fun aspect of what we do. Many of us have shared meals, laughs and tears over the years—both professionally and personally. The comradery of our profession has allowed us to be prepared for the daily challenges of life, and protects those families and friends from having to endure the scary moments that come with a difficult situation. Our time together makes us more powerful, and we should do more to support that.

As secretary, I commit to each member to give my all to the betterment of our association and to help prepare us for our future as a profession and as a collection of vital professionals for our clients.
BIO: Dave started his insurance career in 1980 as a sales representative with Metropolitan Life Insurance Company in his hometown of Brooklyn, New York. In 1985, he branched out on his own, leaving MetLife and opening D. Mordo & Associates LLC in New York City selling individual life and disability insurance, group health and life insurance and annuities.

David sold his agency in 1994 after having moved to Middletown, New Jersey, and took a job as a sales representative with Colburn Insurance Services in Manasquan selling group health insurance products. He also started to recruit brokers to the agency.

In December of 2000, Dave went to work at Walsh Benefits, an employee benefits general agency located in Fair Haven, New Jersey, where he directed the Small-Group Operations department.

In July of 2013, Dave was named vice president of education, compliance & Medicare operations for Walsh Benefits. In that capacity, Dave worked with the agency’s brokers to prepare them for changes in the industry as a result of the Affordable Care Act.

In February of 2016, he went to work as director of compliance and broker education at Slattery GA, a subsidiary of Arthur J. Gallagher & Co. in Holmdel, New Jersey.

Dave is now a senior compliance analyst with BenefitMall via its acquisition of Slattery GA in May of 2018. He is also director of the BenefitMall School of Insurance, where he teaches CE courses to brokers in many states around the country.

In his 42 years in the industry, Dave has focused on consulting with brokers as well as small and large employers in the area of ERISA, HIPAA and PPACA and other employer issues concerning healthcare and health insurance. His advocacy on behalf on employers has taken him to the halls of Trenton and Washington DC, where he speaks with state and federal legislators and regulators.

As an active member of NAHU since 1999, Dave has served as a chapter president and local and state legislative chair. Nationally, Dave has served on NAHU’s Finance, Governance, LPRT and Media Relations Committees. He served on NAHU’s National Legislative Council from 2011 to 2017 and was NAHU’s National Legislative Chair in 2016. He recently became an instructor with NAHU’s Online Learning Institute, teaching a few of the certification courses.

VISION: My vision for NAHU is to see it further evolve into an association that prioritizes unprecedented transparency, an all-encompassing outreach to people who work in all fields of this vast industry and a re-dedication to practicing a bottom-to-top approach to the way we conduct our business for our members. My vision expands to our association becoming more visible to the public, making them aware that our talent, knowledge, experience and acumen as employee benefit specialists is second to none in what we can provide to the millions who rely on us. We need to be far more visible to a community in need of assistance, guidance, compassion and inclusion.
VISION: Collectively as an association, we have the ability to positively implement change that affects our industry and our clients. NAHU and the various chapters will ensure that agents are educated and have the most up-to-date information to be able to serve their community. We will look to engage the local agent, FMOs and lawmakers and empower them to create positive change.

BIO: Shawnee has over 15 years of experience in the insurance industry and has been educating clients to find the best policy for their needs. Shawnee is owner of Crosstown Insurance and has served on the MN chapter board since 2015 (state professional development chair, state legislative chair, chapter treasurer, chapter president and Region 4 LPRT chair). She recently has co-founded Lochloosa to help support other agents within their communities.

Shawnee graduated from University of Minnesota with a sociology degree. Shortly after graduating college, she worked for a captive, before becoming an insurance broker. In 2011, she started Crosstown Insurance (with a focus on Medicare and individual sales) and quickly surround herself with other experts in the industry. Actively participating in the organization, she experienced rapid professional and personal growth. What became apparent was how the legislative work that NAHU provides benefited the customers served.

Shawnee and her husband raise two boys (12 and 14) in the Twin Cities and her agency continues to grow year over year. She is truly passionate about the positive effect a great agent can have on the people in their community and looks to ensure that there is a NAHU agent in every community.
DORIS WALLER
REGION 6 VICE PRESIDENT

BIO: Doris started her insurance career in a Southern California specialty lines P&C agency in 1988 and she knew immediately she had found her calling. Doris transitioned to life & health in 1997, working for an innovative Texas general agency that specialized in serving the underserved. Serving the underserved brings challenges many would not intentionally undertake and, as we witnessed with the ACA, it takes far more than a law. It requires genuine compassion, a keen understanding of the respective demographic you are serving, and the audacity to step outside the status quo.

Doris served as the Dallas Association of Health Underwriters president in 2012, and has served in various roles on the Board since 2009, such as retention, membership, president-elect, past president, professional development, awards and trustee. She also served on the Texas Association of Health Underwriters Board as the retention chair. While Doris was honored with DAHU’s prestigious Henry Dawson Award and several other awards over the years, her greatest achievement has been the opportunity to serve NAHU members at the local, state and national level.

Doris has served as the Region 6 membership chair and Region 6 LPRT chair, and she currently serves on the Vision 2025/Strategic Planning Committee. She is an eight-time Triple Crown recipient, a Soaring Eagle Qualifier for the last five years, a Capitol Club Gold HUPAC contributor and has recruited 86 members over the past 11 years.

Originally joining NAHU for professional-development opportunities, Doris continues her education and has received her NAHU certification in self-funding, advanced self-funding, PPACA, voluntary worksite marketing and single-payer.

Doris currently serves as the regional sales vice president for Pan-American Benefits Solutions, supporting regional and midsize agencies in the Western U.S. She resides in Sachse, Texas, with her husband, Walter. They have two beautiful children and three equally beautiful grandchildren and recently welcomed their first great grandchild, Charlee Rose, to the family. When Doris isn’t working or spending quality time with her family, she is likely volunteering for AHU, her church or for one of her local passions.

VISION: As your Region 6 VP, it has been an honor to serve you for the past two years and, if re-elected, I will continue to focus passionately on membership growth and engagement during my second and final term as your RVP.

In addition to my continued focus on membership growth and engagement, over the next two years I will work to ensure all chapters, large and small, have the resources, support and voice they require to manage a successful chapter—one that their members are proud to belong to and that they can proudly pass on to their new leadership.

Lastly, having served our members in one capacity or another for 11 years, I am still amazed that many do not feel a sense of ownership or of having a voice in their very own association. I will work diligently to make sure our members know, and more importantly trust, that they are the face, the voice, the integrity and ultimately the legacy of NAHU and our industry.

I am beyond honored to be nominated for a second term and, if elected, it would be my privilege to serve as your Region 6 VP.
BIO: Stephanie Berger is the president of Centered Insurance Solutions, a boutique agency in Camarillo, California. Since 2007, Stephanie and her team have focused on working with employer groups to design and implement affordable benefit packages, mainly in the agricultural and manufacturing industries.

Stephanie joined NAHU in 2002 and has held numerous leadership roles at the local, state and national level, including Ventura AHU president 2011-12, California VP of professional development 2012-16, California State president 2017-18 and most recently as the National Professional Development chair for 2021-22. Stephanie has also served as the California PAC board chair for the past two years. She has dedicated much of her time with the association to further developing the educational programs both statewide and nationally. She was a founding member of California’s Women’s Leadership Summit in 2018 and continues her involvement with future WLS events. Stephanie is a lifetime emeritus LPRT qualifier and received NAHU’s Distinguished Service Award.

Stephanie graduated from California Lutheran University with a degree in French and International Business in 2003. Stephanie enjoys being active both in the gym and outside hiking, wine tasting, cooking and reading.

VISION: I am humbled to be nominated as the Region 8 vice president. In this role, I am committed to listening and learning from the members in Region 8 and taking their feedback and perspective to the Board of Trustees to continue to move our professional association forward. My goal is to ensure that all states in our region have the resources needed to be successful and that they fully understand the work that is being done by national on their behalf. Through the committee restructuring and NAHU’s Vision 2025, a tremendous amount of work is being done to enhance the member experience within NAHU; I will do my best to communicate the progress to members and use this as a tool to recruit future members.

I believe that communication is key to the success of our organization, and I will provide clear, consistent messaging to our region so all our states will have the tools to be successful.

I look forward to the opportunity to work with a fantastic group of talented individuals from our region to help continue the success of our association.