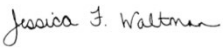


## **Gordon Memorial Award Nomination 2023 of David Mordo**

**Nominee Name:** David Mordo

**Nominee's Address and Phone Number:** 26 Kennedy Court, Middletown, NJ 07748, 732-688-3595

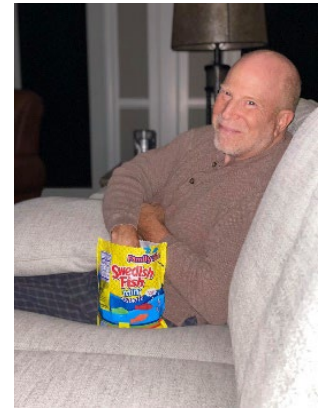
**Nominator:** Jessica Fulginiti Waltman

**Nominator's Signature:** 

**Nominator Address and Phone Number:** 10 Doyle Road, Wayne, PA 19087, 703-496-0796

It is my honor and privilege to nominate David Mordo to receive the Harold R. Gordon Memorial Award and to be the 2023 health insurance industry person of the year.

David, or Mordo as he is more commonly known, has over 40 years of experience in our industry. David began his insurance career in 1980 with Metropolitan Life Insurance Company in his hometown of Brooklyn, New York. In 1985, he opened his own agency in New York City selling individual life and disability insurance, group health, life insurance, and annuities. In 1994 he moved to Middletown, New Jersey, where he still lives today. He sold his agency and began to focus on group health insurance sales, working with employer groups at Colburn Insurance Services and later Walsh Benefits, an employee benefits general agency where he led small group operations.



In 2016, he blended his passions for health policy and health insurance and went to work as director of compliance and broker education at Slattery GA, a subsidiary of Arthur J. Gallagher & Co. in Holmdel, NJ. Dave is now a senior compliance analyst with BenefitMall via its acquisition of Slattery GA in May of 2018. In this role Mordo focuses on consulting with brokers as well as small and large employers in the areas of ERISA, HIPAA, COBRA, the ACA, the CAA of 2021, and other employee benefit plan compliance issues.

David joined the National Association of Health Underwriters (NAHU), now the National Association of Benefits Professionals (NABIP) in 1999, and immediately volunteered for leadership positions. David has served for one year or more as the Secretary, Vice President, President, Legislative Chair, HUPAC Chair, Program Chair, and Education Chair for his local chapter, Monmouth Ocean. At the state level, he spent many years as NJAHU's long-term legislative chair and helped establish the state's PAC, its legislative management team structure, and its wildly successful and imitated State of the State annual event. David also helped hire the state chapter's current executive management firm and the state's current lobbyist, both actions that helped the state chapter grow tremendously. He has been appointed by the New Jersey Department of Banking and Insurance to serve on several advisory boards on

small group and individual insurance. He is a past recipient of the NJAHU Board of Directors Award and the state's highest honor, the Lou Mattei Memorial Award.

On a national level, David has been a delegate at every NAHU convention and an attendee at every Capitol Conference since 2001. His national leadership roles over the years include: member of the national rapid regulatory response team, member of the compliance corner committee, member of the connectors/exchange committee, Chair of the small group emerging issues committee, member of the mental health task force, member of the LPRT committee, member of the media relations committee member of the finance committee, member of the governance committee, member of the NAHU legislative council from 2012-2018, Chair of the NAHU legislative council and member of the Board of Trustees from 2016-2017, and Regional Vice President for Region Two and member of the Board of Trustees from 2020 to the present day.



In addition to all this committee work, he is an instructor for NABIP's Online Learning Institute, where he is a teacher of several certification courses, and along with one of his best friends, David Smith, he created the Pharmacy certification course. In case he could learn more leadership skills to pass on to others, he was a member of the inaugural national chapter leadership class in 2021-2022 and currently helps teach the course. In 2014, NAHU/NABIP honored him with the Distinguished Service Award.

While Mordo clearly serves our industry through servant leadership, his most important role may be how he connects and universally inspires people of very diverse opinions. He's made it his purpose to improve the political discourse in our association, both when it comes to state and national politics

and all of the internal "politics" that plague all industries and associations, including ours. While survey data routinely shows that our association's membership spans the political spectrum, a large number of our most active and vocal members profess to be members of the Republican Party Especially now, with our nation so divided, many people avoid political conversations with people from "the other side." David Mordo is not one of those people. If policy matters or association politics come up in conversation with David (and unless you are talking about baseball, they probably will) David immediately identifies as both a life-long Democrat and NABIP die-hard, no matter who he is talking to or about. Then, every single time, he sets all politics aside and engages in a respectful and meaningful dialogue. His goals are to make the other person feel safe to express their views, to understand the nuances of his conversation partner's point of view, and to seek common ground wherever and whenever possible. He never raises his voice and does not tolerate that behavior in others, and just about every single time, both parties walk away with a new understanding of each other and an evolved perspective.

I can't tell you how many members who are either very politically active Republicans, or very strongly committed to a specific stance that differs from David's point of view, or both have told me with wonder that they cannot believe David is a Democrat, or David likes the name NABIP, or David is a Cowboys fan, because he is so funny/open-minded/solution-oriented/kind/not the devil incarnate. Consistently these people follow up with comments along the lines of now they realize that it is possible to be friends and come to a consensus with a member of the "the other team" (even the Cowboys).

David does not just engage with people in this manner in person. He has a wide range of email and text correspondents, many of which have spun off of controversial posts on LinkedIn, B2B, or other forms of social media. He will also reach out to people he's heard are unhappy about a Board decision or political position. Most people would ignore naysayers and people who appear angry or have an opposing point of view. David seeks them out and changes hearts and minds, including his own when necessary. In these politically charged times, I do not think the value of a popular association leader who seeks to calm and improve the way all Americans communicate about tough issues, including those related to healthcare, can be understated.

David's influence does not just extend to his fellow association members. He has an extraordinary impact on his lawmakers and also his clients. I will never forget a meeting I once attended with his Congressman, Frank Pallone, and several other members of what was then NJAHU. At that time, Congressman Pallone was the Chair of the House Energy and Commerce Committee, perhaps the most important committee to NABIP in terms of policy issues in the House, and several key committee staff members attended the meeting too. Most of the NJAHU members had never visited with Congressman Pallone before and they asked Dave to lead the meeting. Instead of taking charge, he kindly shepherded each member, making sure each had a chance to share their views and NABIP's talking points.

After a while, Congressman Pallone turned the conversation to Dave and a mutual friend of theirs back in the district. The person was a restaurant owner, and Congressman Pallone asked if his business was still part of Dave's personal client portfolio, and David indicated it was. The



two men began to discuss the family who owned the business, as their young child was gravely ill. Congressman Pallone noted that he was pretty sure that the business owner had told him recently that Dave was really helping him out in an extraordinary way and asked him to explain what that entailed. The irrepressible Mordo blushed and looked at his hands. He then quietly explained that the family was having trouble dealing with all of the EOBs, medical bills, and other insurance-related paperwork that comes with having a relative with a

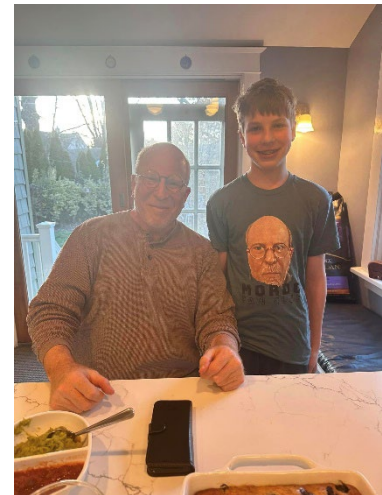
serious medical problem. So, David instructed them to put everything in a box, which he would come and personally collect every week, so that he could go through it all and take care of it for

them. He concluded with “so I am not doing very much, just going through the box for them every week and taking care of all that for them. Their kid is sick--it’s the least I can do.”

Chairman Pallone aptly noted that David’s efforts clearly meant the world to the family, and David’s immediate response was, “No, I’m their broker, that’s just what I do.” David then looked up, right at Chairman Pallone’s eyes and spread his folded hands out expansively, gesturing to all of the NJAHU members in the room. Pausing, David turned his body so he could look directly at each committee staffer present one-by-one. Once every eye in the room was on him, he finished, “We’re all brokers. Please know this is what we all do.”

Now this tale speaks volumes about David’s health and the lengths he goes to serve his clients. However, it also reveals so much more about Mordo and I think perfectly illustrates why he would be the perfect recipient of the Gordon Memorial Award. Chairman Pallone already knew David’s whole role in this story when he asked him to tell it, but the committee staff and other NJAHU members did not. When prompted to explain his work, David did not take credit for his extraordinary actions but instead shared whatever credit he did get with all the brokers in the room. Based on their expressions when Dave was talking, none of the congressional staffers in the room will ever forget the value of a health insurance agent, and none of the NJAHU members present will forget his example of servant leadership. Mordo taught all in the room that day the power of leading through action and the good that comes with going beyond the call of duty and doing little things for others with great love. I often think of David and Congressman Pallone when I want to lobby more effectively. More importantly, I often think about David and how he treats his friends, clients, and all human beings when I am trying to be a better person.

David has the gift of making everyone a little bit better and making people believe in themselves. When I mentioned that I was nominating David for the Gordon to various people this year, I heard things back like, “he paid me the greatest compliment I’ve ever received once and I think of it all of the time,” “he told me I was a good public speaker, and when I never thought I could be a public speaker, and now I do it all the time,” “he’s been my mentor for years,” “he is the best guy I know,” “I could not love that guy more,” “I call him whenever I need to understand a compliance or legislative thing, and he always helps me – even though I work for a competitor,” “he helped me feel welcome when I first joined this association and I never forgot that,” and “he is so funny, and also SO KIND.” Please note that NONE of these people are long-time friends of his, nor people part of his “inner circle.” They are all just people Mordo touched in passing, and they are part of an enormous club of Mordo fans – we even have shirts!!!



The Harold R. Gordon Award was created to honor a person who serves the entire health insurance industry in extraordinary and selfless ways. While it is often awarded to a former

President of the NABIP Board of Trustees or another high-powered industry leader, the real purpose of the award is to honor someone who has shaped our industry indisputably for the better. David Mordo has been embodying the qualities of a Gordon Memorial Award recipient his whole career, and I would argue, his whole life.

David works tirelessly to influence healthcare policy at the national and state levels, and within the association he is always bringing issues to attention of leadership. Beyond identifying issues to work on, he is always willing to analyze new policies and develop nuanced positions that highlight the unique value of the agent. Mordo also builds political bridges over political waters that many others would view as unpassable. Tens of thousands of employers, policymakers, and his fellow brokers have grown their industry, compliance, and public policy knowledge through his work as a continuing education instructor, his client compliance and broker support work, his lobbying efforts, and public and professional development events he's build at the local, state, and national levels. David's never met a person he couldn't build a professional relationship with, and those relationships are always built on respect and the premise of making health insurance and healthcare better for all Americans.

Mordo is a person his local, state, and national chapters can count on to do tough things, like work on a name change, hire a lobbyist, manage a committee, or organize a huge event. However, he is also the person you can ask to put flyers out on all the chairs before a meeting, keep an eye out and engage a newcomer, or manage the backend of registration last-minute when a volunteer needs a break. David is the person who remembers what everyone drinks, texts you to wish you a Merry Christmas when he celebrates Hannukah, asks you about your new grandbaby, and knows to treat you gently when your pet just died.



There is an industry joke that everyone knows Mordo, but his fame is based on his reputation as a lovely, funny, and gracious man. People want to know him, and agents far and wide consider themselves his friend because he is continuously lifting others up through a unique blend of great thoughtfulness, wisdom, compassion, and humor. Beyond the health insurance industry, he has a long history of service through the

Masonic Society, including visiting and reading to hospitalized children regularly. Even though he is a self-described "cheap bastard" if you check the donation list of any friend, colleague, child of a friend, or other individual who is raising money for a charity or needy family, you will find the name of David Mordo and a generous donation quietly added to the total. He the favorite uncle of many nieces and nephews, both biologically related and not, and David was the most amazing son to his parents as they aged, and his dedication to them and his parents' love and pride for the man they raised was evident in their every interaction.

On a personal level, he is the most quietly devoted of friends. He is a person who truly shows up every single day for those he loves and makes everyone he encounters realize that love is verb. I thank God daily that he blesses my life, and the life of my entire family, and feel beyond

honored to consider him one of my best friends. I cannot think of another person who deserves this award more. If you have any questions, or if I can be of assistance during your deliberative process, please do not hesitate to contact me at 703-496-0796 or [jessica@mzqconsulting.com](mailto:jessica@mzqconsulting.com).

Respectfully submitted,  
Jessica Fulginiti Waltman

## Other Supporting Statements

My moments with Mordo.....

Dave Mordo grew very old at a very young age. I'm not sure if that has anything to do with the fact that he has two birthdays a year or, simply because he's had the wisdom of a wise man the first day we met 25+ years ago. Like many wise men, he's a great listener. In NJ, and now nationally, he's known as "The Professor". When he speaks, everyone can't wait to hear what he has to say. It's not just the subtle humor in his delivery, that's just a bonus, it's the fact that he is so knowledgeable on so many subjects impacting our industry. Knowledge is great, but what good is it if you don't share it? In David's case, he's been the favorite CE teacher in NJ for over 20 years. Dave is a giver. He wants to make his competition better with the single purpose of elevating our entire industry. To me, it's always clear that he's taught CE for one purpose—to make our industry stronger and brighter and ensure we serve our clients as our priority. I firmly believe that he is a true reflection of his parents, with whom he was extremely close.

David's passion is our industry. If you need to understand a newly passed or pending piece of legislation in NJ or nationally, just go to Mordo. He's a self-inflicted legislative junkie. Whether he's building relationships with state legislators while visiting them locally, working the hill, or simply spreading his wisdom, his efforts are tireless. He's the embodiment of a leader and I personally know dozens of other professionals who want to be like Dave when we grow up. Unfortunately for us, there's only going to be one Dave! His resume of volunteerism is too long to list, but it's spanned local, state, and national prominence. He's not a volunteer, he's a vocal strategist who helps lead every committee he participates on.

Spanning four different decades of NAHU/NABIP membership and heavy involvement, nothing would make me prouder than seeing David Mordo being awarded the most prestigious industry honor of being named the 2023 Harold R. Gordon Memorial Award recipient.

Sincerely,  
Steve Honig  
President, OCA Services  
Past President of NJAHU



Dear Committee Members,

I first met Dave around 1990 when he was working for a competitor in the hyper-aggressive NJ General Agency world so I wasn't a big fan because I constantly heard his name followed by "Do you have someone on your team like Dave?" No...I didn't...until I did!

All kidding aside...what a wonderful, thoughtful, smart, dedicated professional Dave has been for his entire career. Dave and I served on several carrier advisory boards and then in 2010 when he wanted to move on to a national NAHU position, I was approached to take over his role as Legislative Chair for NJAHU. I agreed to take the position but cautioned everyone early on: "Do not compare me to Mordo.....this is like taking over at shortstop for Derek Jeter"! Dave had been responsible for so much of the success at NJAHU. When he first got involved, we struggled as an association. Over time he helped build it into one of the best state chapters in the country and a presence in our elected halls in Trenton.

In 2014, Dave left his former firm and I had the great luck to convince him to come to work with me! He has obviously done a marvelous job keeping our brokers updated on anything and everything related to benefits I could go on and on here! I am not sure who else is up for this award this year and I am sure they are very deserving but...there is no one and I mean no one that has done more for brokers, NAHU, and our industry than Dave Mordo. I thank you for considering him for this award.

Sincerely,

Desmond Slattery

Benefits Director, BenefitMall

Former Owner, Slattery Agency GA

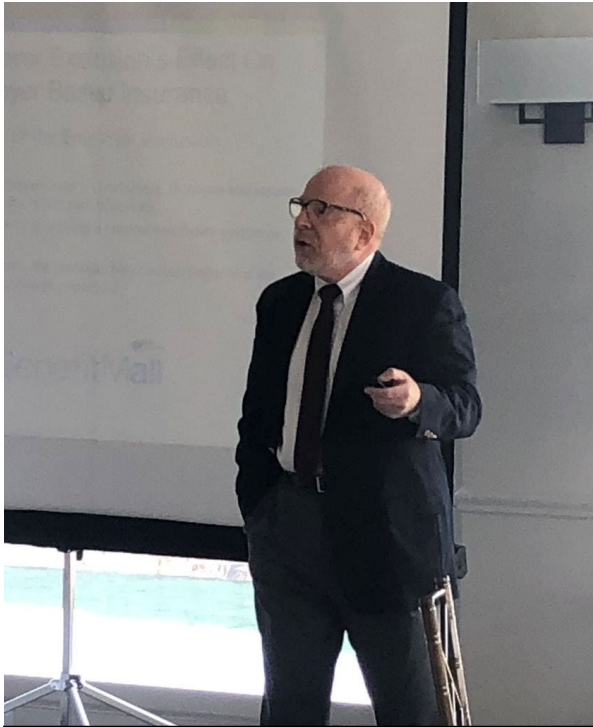
Past Legislative Chair and President of NJAHU

To whom it may concern:

I believe Dave Mordo is very deserving to be nominated for the 2023 Harold R Gordon Memorial Award. Besides being outstanding at what he does, Dave has a genuine compassion for the business. Coupled with a keen sense of humor, Dave breaks down often complex issues into understandable concepts a client can take action on. Dave is an asset to our organization and truly a deserving individual.

Ross Schlossberg, NABIP ACA Certified Executive Sales Director, BenefitMall





**David presenting a CE class to the Coastal NJ Chapter of NABIP – his local chapter.**

To whom it may concern:

As President of the Coastal NJ Chapter of NABIP (Formerly Monmouth Ocean AHU and David's home chapter), I am pleased to write this letter in support of the nomination of Dave Mordo, our Region II Leader, for the 2023 Harold R. Gordon Memorial Award.

From my first days in NJABIP, which is probably ten years ago now, I have always known Dave to be a Pillar of the NJABIP and a friend to all members in each and every one of our State Chapters.

I had the pleasure of knowing Dave when he worked with Walsh Benefits and now with BenefitMall. After a few years of serving on my local Chapter's Board, I was asked to assume the VP role and eventually became President. Dave was continually there to offer his support and lend a hand to assist with the transition to get me up to speed.

At the State level, Dave provides guidance on our Legislative endeavors, has strong relationships with our representatives and he is a resource to many. At the local Chapter level, Dave contributes to our monthly Chapter meetings by providing CE courses and lending

his legislative and industry expertise to our members when needed, which in turn provides value to the Association.

As Dave is about to embark on the next chapter of his life in retirement, it is so fitting to bestow this award upon him. While Dave has mentioned that he will remain a contributor to the NABIP family, whatever direction he takes, he will be missed.

Sincerely,

Carin P. Hep

To whom it may concern:

I am writing to ask your consideration in awarding David Mordo with the prestigious Harold R. Gordon award.

David joined our team through BenefitMall's acquisition of The Slattery Group in 2018. He quickly became an integral part of our broker compliance services. Our broker partners knew David and had engaged with him for years through various employee benefit companies and associations throughout the northeast. It was immediately clear to our team that we were so lucky to have Dave as part of the BenefitMall family.

Mordo has built professional and personal partnerships from coast to coast in our industry. He cares passionately about his work, and his actions to support and protect both brokers and employers is above and beyond in every way.

In 2022 during the NAHU (NABIP) annual conference, I watched David's engagement with attendees. He knows everyone, and everyone knows him! From group CE classes and one-on-one employer consultations to serving as a leader both regionally and nationally, he has acted with commitment and dedication in each interaction and role that he has taken.

As David approaches the end of a stellar 25+ year run in employee benefits, he will be missed by all of us. I appreciate your consideration of David Mordo for this award. I know it will mean a great deal to him.

Dave is a deserving recipient that makes a difference in our industry.

Regards,

Laura Clenney  
*BenefitMall VP, Marketing and Product Development*

