



SYNERGY

NATIONAL ASSOCIATION OF BENEFITS
AND INSURANCE PROFESSIONALS

2023 ANNUAL CONFERENCE
JUNE 24-27
NEW ORLEANS, LA

WWW.NABIP.ORG



2023 NABIP ANNUAL CONFERENCE SCHEDULE

FRIDAY, JUNE 23

9 am - 5 pm 2022-23 Board of Trustees Meeting *Imperial 5AB*

9 am - 5 pm Attendees arrive beginning today! *No official NABIP Activities today.*
ENJOY NOLA!

SATURDAY, JUNE 24

8 am - 3:30 pm Registration is Open *Celestin C*
10 am - 2 pm – Credentialing
8:30 am - 3:30 pm – Gordon Seating Choice

8:30 am - 3:30 pm Region 5 Leadership Conference *Celestin F*

8:30 am - 3:30 pm Not involved in a specific meeting today? **ENJOY NOLA!**
▶ Be back at 4 pm for a conference opening you will not want to miss!

9 am - 5 pm NABIP PAC Concierge Lounge Open *Celestin H*

4 - 4:30 pm Conference Kick-off NOLA style! Wear comfortable shoes and don't be late! *Meet Hotel Lobby*

4:30 - 6 pm Registration is Open *Celestin C*

4:30 - 6 pm Welcome Reception with Sponsors/Exhibitors in the NABIP Marketplace
Sponsored by Take Command *Storyville Hall*

8 - 10 pm Vanguard Council, NABIP PAC, Fun & Frivolity Committee Annual
Convention Kickoff Party at Barcadia *Barcadia:
601 Tchoupitoulas St,
New Orleans*

10 pm **ENJOY NOLA!**

SUNDAY, JUNE 25

6:30 - 7:30 am Yoga with Naama Pozniak *Imperial 5AB*

7 am - 4 pm Registration Hours *Celestin C*
11:30 am - 1:30 pm – Credentialing
7 am - 4 pm – Gordon Seating Choice

2023 NABIP ANNUAL CONFERENCE SCHEDULE

SUNDAY, JUNE 25

7:30 - 8:30 am	Breakfast with Sponsors/Exhibitors in NABIP Marketplace Coffee Sponsored by Avesis	Storyville Hall
9 am - 5 pm	NABIP PAC Concierge Lounge Open	Celestin H
8:30 am - 12 pm	General Session including: ▶ Featured Speaker: David Chase, <i>Co-Founder, Health Rosetta</i> ▶ Keynote Speaker: Kristen Hadeed, <i>Thought Leader and Entrepreneur</i>	Celestin DE
12 - 2 pm	Lunch with Sponsors/Exhibitors in the NABIP Marketplace Sponsored by AGA	Storyville Hall
2 - 5 pm	Awards Ceremony, NABIP PAC Parade of Checks and Town Hall Meeting	Celestin DE
6 - 9 pm	LPRT Event on the Creole Queen <i>(by invitation only)</i>	Uber to the Hilton New Orleans Riverside 2 Poydras Street
9 pm	ENJOY NOLA!	

MONDAY, JUNE 26

7 - 9 am	Breakfast with Sponsors/Exhibitors in the NABIP Marketplace Coffee Sponsored by Avesis	Storyville Hall
7:15 - 8:45 am	Vanguard Networking Breakfast	Celestin F, G
7:30 am - 2 pm	Registration Hours 10 am - 12 pm; 1 - 4 pm – Credentialing 7:30 am - 12:30 pm – Gordon Seating Choice	Celestin C
9 - 9:45 am	General Session with Keynote Speaker Dr. Keith Smith, <i>Founder, Free Market Medical Association</i>	Celestin DE
9 am - 5 pm	NABIP PAC Concierge Lounge Open	Celestin H
10 - 10:45 am	Professional Development Sessions: BREAKOUT SESSION 1 ▶ Shifting Client Priorities Track: Proven Ways to Wow Your Clients Post Enrollment Season and Beyond ▶ Steve Odgen, <i>Sales Manager, AgencyBloc</i> <i>Sponsored by AgencyBloc</i> ▶ Mergers & Acquisitions Track: Intentional Perpetuation Part I ▶ Brett Rosen, <i>Principal, Rosen Advisory</i> ▶ Medicare Track: Medicare State of the Union - 2023 and Beyond ▶ Moderator: Mike Smith, <i>President, The Brokerage, Inc.</i> ▶ Panelists: Amanda Brewton, <i>Owner of the FMO, Medicare Answers Now</i> ; Patricia Griffey, <i>RHU, REBC, Page 1 Agency</i> ; Chalen Jackson, <i>Key Accounts Specialist and Compliance Officer, MMG, Inc.</i> ▶ Cost, Risk & Affordability Track: How to Compare an ICHRA to Traditional Methods ▶ Annette Bechtold, <i>Leadership and Executive Coach and Consultant, Forte Consulting</i> ▶ Trending Topics in Healthcare Track: Matters of Perspective: Generational Viewpoints from Females in Benefits ▶ Janet Trautwein, <i>Executive Vice President & CEO, NABIP</i> ▶ Susan Combs, <i>CEO, Combs & Company, LLC</i> ▶ Jasmine Keating, <i>Client Engagement Manager, MZQ Consulting, LLC</i> ▶ Quincy Atwood, <i>Benefits Advisor, Specialty Risk Insurance</i> ▶ Lisa Edwards - Hutcherson, <i>Voluntary Benefits Consultant, Brown and Brown</i>	Celestin B Celestin F Celestin G Imperial 5CD Imperial 5AB

2023 NABIP ANNUAL CONFERENCE SCHEDULE

MONDAY, JUNE 26

continued

11 - 11:45 am Professional Development Sessions:

BREAKOUT SESSION 2

- ▶ **Shifting Client Priorities Track:** Long Term Disability - A Non-Health Insurance Approach Leading You to Success *Celestin B*
 - ▶ Dane Rianhard, *Principal and Co-Founder, TriBridge Partners, LLC*
Sponsored by NextAgency
- ▶ **Mergers & Acquisitions Track:** Intentional Perpetuation Part II *Celestin F*
 - ▶ Moderator: Brett Rosen, *Principal, Rosen Advisory*
 - ▶ Panelists: Mark Gaunya, *Principal, Borislow*; Dan Mangus, *VP of Growth and Development, Senior Marketing Specialists*; Robert Tierney, *Principal, OneDigital*
- ▶ **Medicare Track:** Clarifying Marketing Rules - Medicare Advantage for PY2024 *Celestin G*
 - ▶ Mike Smith, *President, The Brokerage, Inc.*
 - ▶ Justin Reinig, *Executive Leader, Oberlin Marketing*
- ▶ **Cost, Risk & Affordability Track:** Diabetes and Chronic Disease Risk Management Strategies: Effective health plan design techniques to reduce costs while also improving care *Imperial 5CD*
 - ▶ George Huntley, *COO and CFO, Theoris Group, Inc., and CEO, Diabetes Leadership Council*
- ▶ **Trending Topics in Healthcare Track:** The Crisis in Cost-Sharing: Shifting the Focus from Payment Design to Plan Innovation *Imperial 5AB*
 - ▶ Kevin Kickhaefer, *President and Chief Growth Officer, Gravie*

11:45 am - 1:45 pm Lunch with Sponsors/Exhibitors in the NABIP Marketplace
Sponsored by BenefitMall *Storyville Hall*

2 - 2:45 pm Professional Development Sessions:

BREAKOUT SESSION 3

- ▶ **Shifting Client Priorities Track:** Simplifying HR Benefit Services - Employee Reengagement *Celestin B*
 - ▶ Carla Adams, *Director of Benefit Services, isolved*
- ▶ **Legislative Impact Track:** Compliance Corner *Celestin F*
 - ▶ Jennifer Spiegel Berman, *CEO, MZQ Consulting*
 - ▶ Barb Gerken, *SVP, Director of Client Innovation and Employee Benefit Compliance, First Insurance Group*
 - ▶ Annette Bechtold, *Leadership and Executive Coach and Consultant, Forte Consulting*
 - ▶ Ross Carmichael, *Managing Director of Compliance and Operations, Higginbotham*
- ▶ **Medicare Track:** How the Tech World Impacts Medicare *Celestin G*
 - ▶ Moderator: Korey Ashton, *Director of Client Partnerships & Insurance Solutions, SunFire*
 - ▶ Panelists: Justin Brock, *President and CEO, Bobby Brock Insurance*; Tony Merwin, *Owner, Avila Medicare Solutions*; David Ireland, *Regional Sales Director, The Brokerage*
- ▶ **Cost, Risk & Affordability Track:** How Employers Can Offer Valuable and Affordable Mental Health Benefits *Imperial 5CD*
 - ▶ Elizabeth Owings, *CEO & Co-Founder, Samata Health*
 - ▶ Sarah Malavernda, *Co-Founder & Chief Operating Officer, Samata Health*
- ▶ **Trending Topics in Healthcare Track:** The Evolution of Reference - Based Pricing *Imperial 5AB*
 - ▶ Jacob Bohannon, *Director of Business Development, Imagine360*
 - ▶ Will Buckley, *Regional Vice President, Market Leader, Imagine360*

2023 NABIP ANNUAL CONFERENCE SCHEDULE

MONDAY, JUNE 26

continued

3 - 3:45 pm Professional Development Sessions:

BREAKOUT SESSION 4

- ▶ **Shifting Client Priorities Track:** Paramount Communication and Engagement: Maximize Your Enrollment Success *Celestin B*
 - ▶ Eric Silverman, *Founder and Owner, Voluntary Disruption*
- ▶ **Legislative Impact Track:** ACA and Beyond Certification Primer from 3:00 - 4:30 pm *Celestin F*
 - ▶ Paul Roberts, *Senior Director of Education & Market Development, Word & Brown*
- ▶ **Medicare Track:** How to Become a 6-Figure Senior Market Advisor *Celestin G*
 - ▶ Brandon Clay, *CEO, Brandon Clay Enterprises, Author of Six Hours to Six Figures*
- ▶ **Cost, Risk & Affordability Track:** Health Status, Social Circumstances, and Medical Costs – Professionals Working More Effectively with Low-income People *Imperial 5CD*
 - ▶ Linda Riddell, *Chief Data Scientist, Validation Institute*
- ▶ **Trending Topics in Healthcare Track:** Telehealth Transformations - From Foundations to Its Future *Imperial 5AB*
 - ▶ Reid Rasmussen, *Co-Founder and CEO, freshbenies*
 - ▶ Michael Gorton, *Founder of Teladoc and Founder and CEO of Recuro*

3:45 - 4 pm Break sponsored by MassMutual *Celestin Prefunction*

6 - 6:30 pm Friends of Bill W *Imperial 11*

6 pm Reception for Gordon Attendees *Celestin Foyer*

6 pm Soaring Eagle/Past Presidents/Gordon Recipients Reception *Imperial 5AB*

7 - 11 pm Gordon Dinner including Award Presentations and Masquerade Ball *Celestin DE*

TUESDAY, JUNE 27

8 - 9 am Credentialing *Celestin C*

- 8:30 - 9:30 am Regional Meetings
- ▶ **Region 1 & 2:** CT, ME, MA, NH, NY, RI, VT, DE, MD, VA, NJ, PA *Imperial 12*
 - ▶ **Region 3:** IL, IN, KY, MI, OH, WV *Imperial 5AB*
 - ▶ **Region 4:** MN, IA, NE, ND, SD, WI *Imperial 11*
 - ▶ **Region 5:** AL, FL, GA, MS, NC, SC, TN *Imperial 5CD*
 - ▶ **Region 6:** AR, KS, LA, MO, OK, TX *Celestin B*
 - ▶ **Region 7:** AZ, CO, ID, MT, NM, UT, WY *Imperial 9*
 - ▶ **Region 8:** AK, CA, HI, NV, OR, WA *Celestin F*

9:45 am - 12 pm House of Delegates/Voting *Celestin DE*

12 pm ENJOY NOLA! Safe travels home!

12 - 2 pm 2023-24 Board of Trustees Meeting *Celestin B*