



NEWSLETTER
KEEPING YOU CONNECTED & CURRENT

NABIP-Dallas Upcoming Event

Join us for the NABIP-Dallas May Event!

Wednesday, May 15 at Vouv Event Center in Dallas
11:30 AM – 1:00 PM

Pharmacy Benefits, Evolved (CE #139385)
Presented by: Rory Milne,
Regional Sales Manager at SmithRx

Please register in advance our [website](#)
\$40 Members | \$50 Non-Members



Join us for the upcoming NABIP-Dallas May luncheon to hear from Rory Milne, Regional Sales Manager for SmithRx. Rory will delve into the rapidly evolving pharmacy landscape to provide brokers, agents, and consultants with a deeper understanding of the state of the industry, factors that are driving up pharmacy costs, the latest trends in GLP-1s, and overview of the J&J lawsuit. Our speaker will also give an overview of the role of pharmacy benefit managers (PBMs) and some of the games that are played in the industry.

Don't miss this opportunity to learn from an industry leader and network with fellow benefits professionals. Register now to secure your spot at this exclusive luncheon course!

About Rory:

Rory Milne is the Mid-West Regional Sales Manager for SmithRx, a pharmacy benefit management (PBM) company based in San Francisco. For the past 2 years, Rory has demonstrated a wealth of experience and passion in his role. His dedication to transparency, education, and cost-saving strategies benefits SmithRx's clients greatly. As a seasoned professional in the field, he's adept at navigating challenges and seizing opportunities, ensuring you receive nothing short of exceptional service.

NABIP-Dallas Member Spotlight

Isabelle McCutcheon

Sales Executive, Allstate Benefits

Isabelle McCutcheon is a Voluntary Benefits Sales Executive for Allstate Benefits. She has been a member of NABIP for 3 years. Isabelle enjoys attending the monthly luncheons for the content as much as the people. While the CEs are a nice bonus, the meetings have truly helped Isabelle learn so much about the industry and further her knowledge, all while meeting some pretty fantastic individuals!

She also loves that the organization gives back. She remembers when NABIP-Dallas hosted Derby Day for the Texas Therapeutic Riding Center. Isabelle grew up riding horses, so it was awesome for her to see two of her passions past and present (horses and insurance) come together to give back to such an amazing organization! Outside of work, you can likely find Isabelle at Pure Barre or enjoying a nice patio cocktail with her finance and their doodle pup, Moose.



NABIP-Texas Conference 2024



NABIP-TX hosted its annual conference April 15-16 at the Westin Irving Convention Center at Las Colinas, Irving, TX. The conference was filled with a full, two-day agenda that included a Medicare focus, a Legislative Luncheon, general sessions, and numerous breakouts. One of these breakouts included a presentation from NABIP-TX lobbyists Shannon and Mike Meroney titled “The State of Politics Today and Effects on Policy.” The conference had also hosted Jessica Brooks-Woods, CEO of NABIP, as the keynote speaker.

NABIP-Dallas was excited to receive the “NABIP-TX PAC Highest Amount by Chapter Award” for 2024. Pictured here is Cindy Goodman, NABIP-Dallas Secretary, accepting the award on our chapter’s behalf at the Hollis Roberson Award Dinner.

Congratulations to Mark Bellman!



Congratulations to Mark Bellman, winner of the 2024 Hollis Roberson Award!

Hollis Roberson, CLU, FLMI, RHU, held a BS from the University of North Alabama, an MBA from Auburn University and an MS from Southern Methodist University. Mr. Roberson served the insurance industry in the capacity of life insurance company president, chief actuary and owner of his own agency. He served NAHU (now NABIP) tirelessly first as Membership Chairman in 1986-87 and Region IV Vice President in 1986-87. He was elected First Vice President in 1988. Hollis directed the strategic planning committees for NAHU, Texas AHU (Now NABIP-TX), Fort Worth AHU and Dallas AHU. He published many articles and spoke to numerous health and life underwriter organizations. Hollis Roberson was the 1989 recipient of the Norman Medill Award for editorial contribution from NAHU. He was listed in the Who's Who in Insurance in the South-Southwest. Hollis was the first recipient of the Hollis Roberson Award in 1989, which was established in his honor.

Hollis died of cancer at the age of 67 on December 16, 1989, at his home in Rowlett, Texas. He was president-elect of NAHU at the time of his death.

The National Association of Benefits and Insurance Professionals' Hollis Roberson Award is presented each year to the person from Texas who meets the criteria of professionalism set forth by Hollis Roberson.

The recipient of the award is selected by the Hollis Roberson Award Committee which carefully reviews all persons nominated. In making its selection, the committee looks for contributions above and beyond the call of duty, without personal gain. Your recommendations must be supported by an accompanying statement that details the accomplishments of your candidate to include present and former positions, connections with health insurance, biographical information and, of utmost importance, the specific accomplishments that entitle your candidate to this prestigious award.

Highlights from the NABIP-Dallas April Meeting



Photo by Howard Deihl

Keith Kennington, Vice President at Healthcare2U, led an engaging presentation, “Direct Primary Care and How It Can Be Used” (CE # 122318) at the NABIP-Dallas meeting at Vouv on April 17.

Keith delved into: Increased access to primary and urgent care services from a dedicated provider, No-cost or low-cost basic labs and prescription drugs, and Reduced employee absenteeism due to flexible scheduling and shorter wait times. A huge thank you to Keith for a great presentation!

NABIP-Dallas 2023-2024 Board of Directors

President: Taylor Kirkhart
Secretary: Cindy Goodman
Awards: Carmen Freeman
Membership: Karen Burkholder
Professional Development: Meghann High
Executive Assistant: Patricia Pattison

Past President: Jennifer Stanley
Treasurer: David Weber
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Communications: Jared Leshin
Legislative Chair: Claire Pancerz
Trustee: Rita Rolf

Interested in giving back to the association and joining our team? We have multiple open board positions and volunteer opportunities, such as: President-Elect (requires two years of service on a NABIP Board or similar association (such as NAIFA), Membership Co-Chair, Retention Chair, Sponsorship Chair, Legislative Co-Chair, as well as opportunities to assist us with special projects, events, and charity initiatives. Board meetings are held on the 2nd Friday of the month.

For more information, please contact us at dahu.org@gmail.com

Become a Monthly NABIP-TX PAC Contributor!



DONATE TO TAHUPAC

TAHUPAC formed to support candidates and members of the Texas Legislature who have philosophies that reflect common sense and an overall understanding of the dynamics of health insurance along with recognizing how NABIP-TX is working to bring more Texans more affordable health insurance plans.

Donate now using the QR code below!



The Texas Association of Health Underwriters recognized more than a decade ago the need to become more involved in “politics” and formed NABIP TX PAC to support candidates and members of the Texas Legislature who have philosophies that reflect common sense and an overall understanding of the dynamics of health insurance along with recognizing how NABIP TX PAC is working to bring more Texans more affordable health insurance plans.

NABIP Washington Update



Fast Facts

- **BREAKING NEWS:** IRS Announces 2025 HDHP Limits
- New CMS Press Release on Agent and Broker Marketplace Activity
- Improving Access to Medicare Coverage Act 2023
- Protecting Seniors from Lifetime MA Penalties
- Read the PAC Update to keep up with political and election news.
- The Healthcare Happy Hour Podcast is back with a new episode!
- The new NABIP E&O insurance program offers a streamlined application, better pricing, and enhanced coverage and support.

NABIP’s Washington Update is co-authored by PAC Manager Caroline Musumarra and State Affairs Director Max Karlin.



ANNUAL CONVENTION 2024

**JUNE 22-25
CHICAGO**

Hyatt Regency Chicago
151 E Wacker Dr, Chicago, IL 60601

BOOK YOUR ROOM TODAY!

EXHIBIT HALL SPOTS GOING FAST!
Visit **NABIP.org** for Sponsorship Opportunities

EVENT HIGHLIGHTS INCLUDE:

- Saturday night Welcome Party at Howl at the Moon Dueling Piano Bar!
- Sunday night LPRT Party at Nitti's Supper Club at the famous Harry Caray's
- Monday night Gordon Dinner/Speakeasy Party

Registration, the preliminary agenda, and hotel information can be found [here](#)



meetinchicago.com

Chicago is excited to welcome you for the NABIP Annual Convention at the Hyatt Regency Chicago. While you're here, feel free to explore world-class museums, award-winning restaurants, and a variety of shows in one of more than 200 theaters. No matter what you love to do, you'll fit right in. Experience some of the city's top attractions while you're here:

- EXPLORE MILLENNIUM PARK
- RIDE THE FERRIS WHEEL AT NAVY PIER
- STROLL THE CHICAGO RIVERWALK
- SHOP THE MAGNIFICENT MILE
- TAKE AN ARCHITECTURE TOUR
- VISIT OUR MUSEUM CAMPUS
- DINE IN THE WEST LOOP
- ENJOY THEATRE AND IMPROV
- CATCH A BASEBALL GAME
- DISCOVER THE LINCOLN PARK ZOO



Soaring Eagle

Tanya Boyd (6 years)
Gary Bush (1 year)
Gary Daigle (1 year)
Betsey Vascil (9 years)
Reid Rasmussen (10 years)

Eagle

Nicole Moran (1 year)

President's Council

Dana Call (1 year)

Lifetime & Qualifying

Sandra Longacre (18 years)

Lifetime & Qualifying Soaring Eagle

Howard Crissey (11 years)
Kim Foster (7 years)
David Goldfarb (19 years)
Andra Grava (10 years)

Golden Eagle

Louanne Trebing (25 years)
Joann Charron (5 years)

About LPRT (Lead Producers Round Table)

In the insurance business as in many other industries, some individuals seem to consistently be top producers. Not only are they top producers, but they also strive for excellence in their field and provide impeccable service to their clients. The top-notch way they do business means that their clients are happy, and that there are fewer service problems for you.

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A top producer in the insurance industry is like a center of excellence in the medical arena. Their expertise in their field results in their ability to produce a significantly greater amount of business yet do so in a cost-effective manner. Their outcomes are better than those of other producers because of their dedication to excellence and the volume of business they produce.

At NABIP, we have a program designed to reward our members who are outstanding producers. That program is the Leading Producers Roundtable. LPRT qualifiers receive a number of free or discounted educational offerings and other services from us – after all they are the best of the best and we depend on their knowledge and dedication to their industry to help our own organization be the best.

[LPRT Member Application](#)

The Leading Producers Round Table (LPRT) formed in 1942 to recognize the successful underwriters of accident and health insurance. Today, the committee is committed to making LPRT the premier program for top health, disability, long-term care and worksite marketing insurance producers, carrier reps, carrier management, and general agency/agency managers.



Welcome to the NABIP Resource Hub! Check out our library of free downloadable content including white papers, guides, eBooks, case studies, reports, industry analysis and much more, provided by experts and vendors within the health insurance and employee benefits industry.

Featured Resource from the Resource Hub

How Section 105 Medical Reimbursement Plans Save on Taxes

If you are looking to learn more about an alternative way of funding medical costs, Section 105 plans, whether Health Reimbursement Arrangements or Medical Expense Reimbursement Plans, could be the right option for you or your client.

NABIP-Dallas Member Resources

- ❖ NABIP-Dallas meets every 3rd Wednesday of the month (with the exception of December) at Vouv Event Center (4445 Sigma Road, Dallas, TX 75244).
- ❖ New NABIP-Dallas members can register for their first lunch meeting at no cost. Email dahu.org@gmail.com to confirm your registration.
- ❖ [Lone Star \(Virtual\) Chapter](#) frequently offers online CE webinars at no cost for NABIP-Texas members.

Thank you to our Sponsors!

