

NABIP-DALLAS

MARCH NEWSLETTER

National Association of Benefits and Insurance Professionals
Dallas Chapter



NABIP
Shaping the future of healthcare



March 25, 2026
9:00 am - 4:00 pm

EDUCATION DAY

SPEAKER SPOTLIGHT



Naama O. Pozniak



Henry Santos



Julian Sados



Rachel Strauss



Mike Smith



Kylie Everhart



March 25, 2026
9:00 am - 4:00 pm

EDUCATION DAY

SPONSOR SPOTLIGHT



Upcoming Events

Check back regularly for new and upcoming events hosted by NABIP-Dallas!

If you would like to get involved as a **VOLUNTEER** or **SPONSOR** for any of the events, please complete and submit the appropriate form.

<https://www.nabip-dallas.org/event-list>

UPCOMING *Events*

	Education Day 2026	MARCH 25 2026
APRIL 22 2026	Jennifer Stanley- "No More Secrets - Compensation, Contracts, and Compliance CAA 2021 & 2026"	
	Pickleball networking, food & drinks	MAY 28 2026

For more information go to www.nabip-dallas.org.com

NABIP TEXAS: RECHARGE YOUR MEMBERSHIP

It's Time to Plug Back In.

Recharge Your Membership

for a limited time only, renew your membership and get a

\$25  **GIFTOGRAM GIFT CARD!***
**CHOOSE FROM MORE THAN 250 RETAILERS
IN YOUR LOCAL AREA AND NATIONWIDE!**

Become a member NOW and take advantage of the benefits of NABIP Membership

* Membership must have lapsed more than 6 months ago to be eligible for this offer. Once you have re-joined, email admin@nabip-tx.org with the subject "I'm Recharged" and we will send you a gift card.



CHARGING...

CALLING ALL NABIP MEMBERS NATIONWIDE!!



NABIP-TX

MEMBERSHIP BLITZ 2026

MARCH MADNESS THROUGH MARCH 31, 2026

GET IN THE GAME, TEXAS!

The **NABIP-TX** March Madness Membership Blitz is tipping off — and your chapter has a full month to recruit and score big for our State Chapter.

BLITZ INCENTIVES

(Through March 31, 2026)

For Every Member Who Joins in the Month of March:

- **\$50 Gift-o-Gram Giftcard** — instant win for new members

This incentive makes it the perfect time to bring a colleague off the bench and into the **NABIP-TX** network.

BLITZ THROUGH MARCH 31, 2026

THE CLOCK IS RUNNING — SHOOT YOUR SHOT NOW!

JOIN THE MADNESS. GROW YOUR CHAPTER. STRENGTHEN OUR INDUSTRY.

Become a member of NABIP-TX

JOIN NOW



JOIN THE NABIP DEI & B VIDEO CAMPAIGN!

WE WANT YOU TO BE PART OF SOMETHING POWERFUL



The NABIP DEI and B Committee is collecting selfie videos from our members to showcase the strength and unity of our community. Here's how you can participate:

“I am NABIP.” (pause) “We are NABIP.”



MULTILINGUAL WELCOME! Feel free to say it in any language you're comfortable with - we celebrate diversity!



FINAL MONTAGE: All videos will be creatively edited by a professional videographer and will conclude with *Jessica Brooks-Woods* saying: **“We are NABIP!”**



WHERE IT WILL BE SHOWN: The final video will be showcased at NABIP National Events - don't miss your chance to be part of it!



SUBMIT YOUR VIDEO: When you're ready, email your portrait-mode video to:
helen.harris-allen@associateadbank.com

NABIP-DALLAS - WE'D LOVE TO SEE YOUR FACES!

NABIP-Dallas: Legislative Chair Report

Capitol Conference 2026: Local Members Help Deliver Record-Breaking National Advocacy Impact

NABIP's 2026 Capitol Conference wrapped up on **Tuesday, February 24**, after three days of high-impact policy discussions, professional development, and coordinated advocacy on Capitol Hill. Local members were well represented throughout the event, contributing to a powerful national showing.

This year's conference brought together leading voices in federal health policy. Attendees heard from CMS Deputy Administrator **John Brooks** on prescription drug policy, **CCIIO Director Peter Nelson** with a detailed look at the ACA Marketplace, **FDA Commissioner Dr. Marty Makary** outlining the agency's 2026 priorities, and keynote speaker **Mosheh Oinounou**, who delivered a timely message on building trust and cutting through today's noisy communications landscape.

Breakout sessions covered the issues shaping our work every day, including Medicare from the perspective of state regulators, Marketplace evolution, compliance, state health policy, and candid conversations with congressional staff and Members of Congress, including **Rep. Tom Suozzi (D-NY)**. Regional meetings helped members align on federal priorities and prepare for Tuesday's Hill visits.

Local Members Contribute to a National Advocacy Milestone

This year's Capitol Conference delivered measurable, record-setting advocacy impact. NABIP partnered with Advocacy Associates to coordinate congressional meetings and power the conference app, creating a seamless experience for attendees.

In a single day of coordinated action,

- **669 members,**
- **representing 40 states,**
- **conducted 364 confirmed congressional meetings,**
- **including 77 Senate offices.**

That level of access is rare in Washington, and it speaks directly to NABIP's credibility, long-standing relationships, and the professionalism our members bring to every conversation. As always, outreach was firmly bipartisan, with meetings nearly evenly split between parties. Our message remains clear, NABIP is a trusted, nonpartisan voice for the millions of consumers and employers we serve.

Local members played an important role in this national effort, reinforcing the strength, preparation, and professionalism that define our chapter and the broader NABIP community.

Why This Work Matters at Home

Federal policy decisions directly shape the work we do across North Texas, from Marketplace stability to Medicare guidance to employer-sponsored coverage. Capitol Conference ensures that lawmakers hear from the people who understand these issues best, our members.

Your advocacy helps protect consumer choice, strengthen employer plans, and ensure that agents and brokers remain essential partners in America's health coverage system.

Thank You to Our Local Members

To every member who traveled to Washington, engaged in sessions, met with lawmakers, or supported colleagues from home, thank you. Your commitment elevates our chapter and advances the profession.

We look forward to carrying this momentum into our local advocacy efforts and continuing to represent our community as a leading voice within NABIP nationwide.

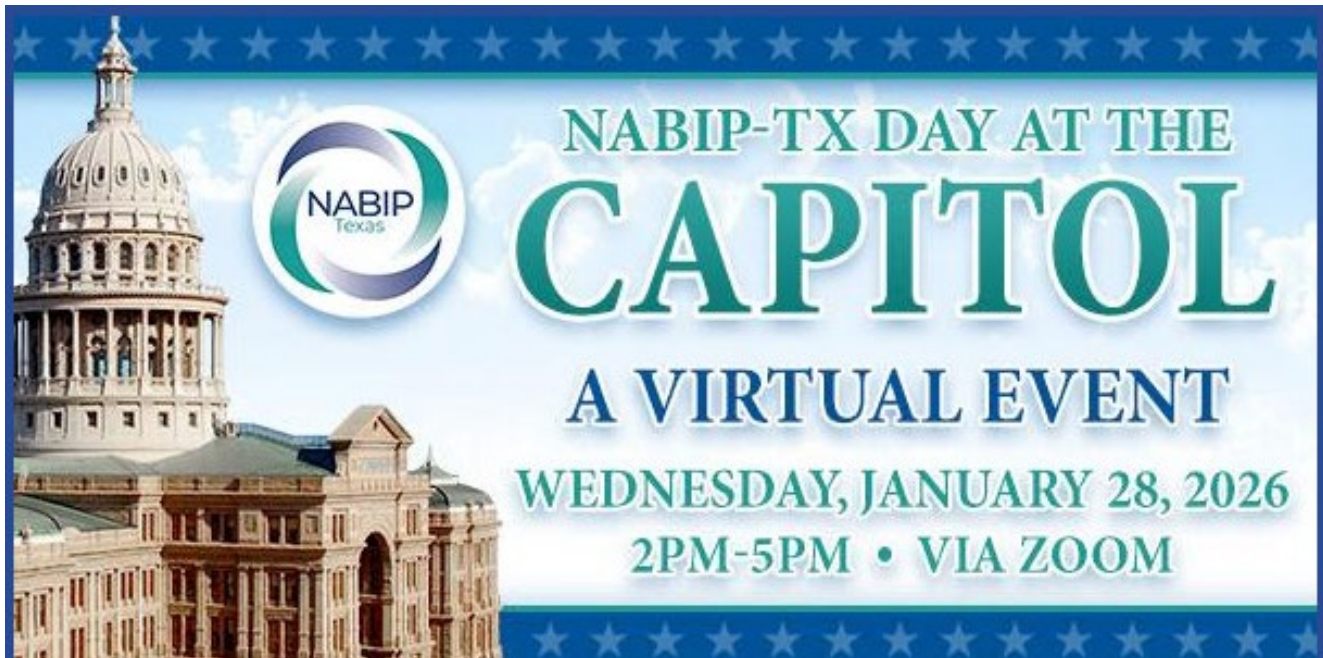
Sincerely,

Charles Rosen

RVP Region VI, Director of Leg Affairs, NABIP-TX, and Legislative Chair, NABIP-Dallas.



NABIP-TX E-NEWS



Thank you for attending Virtual Day at the Capitol on January 28, 2026

**Please take a few minutes, if you haven't already submitted
a survey, to complete
a brief survey so we can continue
to provide you with the best value.**

[Click here to access the Survey](#)

**Thank you to the
2026 Day at the Capitol sponsors!**

PREMIUM SPONSOR

oscar

PARTNER SPONSOR

KyraHealth

NABIP-TX | admin@nabip-tx.org | nabip-tx.org



Faster Updates. Real-Time Alerts. Opt In Today! NABIP-TX Mobile Text Alerts System

We know your schedule is busy, and staying up to date shouldn't be a challenge. That's why NABIP-TX is introducing mobile text alerts—an easy way to receive important updates, legislative news, and event reminders straight to your phone.



What You'll Get When You Opt In:

- Timely **LEGISLATIVE UPDATES** - You'll never miss a Call to Action!
- **EVENT REMINDERS** - Chapter meetings, webinars, Day at the Capitol or Annual Conference
- **MEMBERSHIP NEWS** and announcements
- **INDUSTRY INFORMATION**

We promise: **NO SPAM, NO OVERLOAD-**
just the helpful, relevant info you actually want, straight to your phone.



Join the NABIP-TX Texting Program

Click [HERE](#) to opt in through our quick sign-up form.

Thank you for being an important part of NABIP-TX!

We can't wait to stay even more connected with you!

If you have any questions, feel free to [contact us](#) - we're here to help.

NABIP-TX Region 6 PAC Contributions:

Region 6 as a whole contributed

\$67,577.62

For the year of 2025!

Keep Your Contributions Going!

Please check and update your account with your current credit card information.

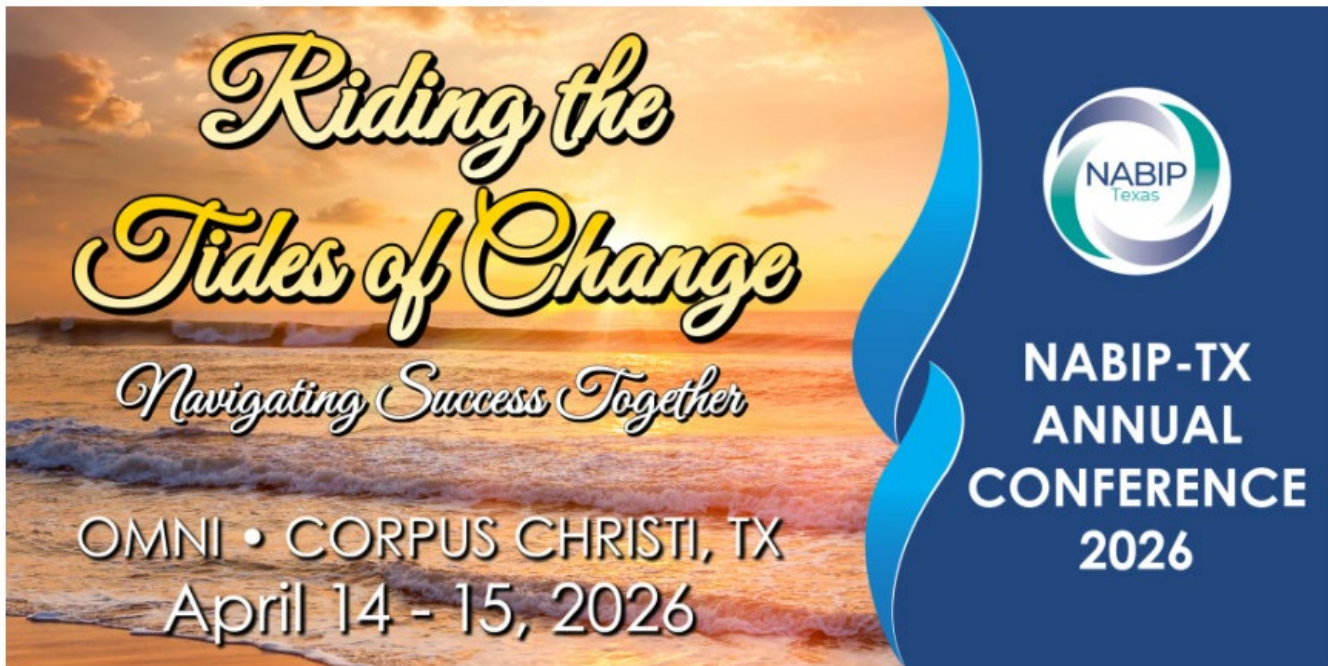
1228 9435 5900 900

UPDATE

Don't Let Your Payments Lapse!

The infographic features a map of the United States with the central region (Region 6) highlighted in green. The background is a vibrant blue with yellow and green stars and confetti. The text is presented in various fonts and colors, including a large, bold, gold-outlined number for the contribution amount. At the bottom, there is an illustration of a blue credit card, a smartphone displaying a green checkmark and an 'UPDATE' button, and a shield with the text 'Don't Let Your Payments Lapse!'.

NABIP- TX ANNUAL CONFERENCE



[**REGISTER HERE**](#)

Registration Information

REGISTER ONLINE at NABIP-TX.org and click on the ANNUAL CONFERENCE.
 NOT A MEMBER? [Join NABIP-TX](#) and Save \$50! Register by Tuesday, March 24 and Save \$25!

	EARLY BIRD RATE <i>Before 3/24/26</i>	REGULAR <i>After 3/24/26</i>
MEMBER CONFERENCE REGISTRATION:	\$195	\$220
NON-MEMBER CONFERENCE REGISTRATION:	\$245	\$270

AGENCY SPONSORSHIP

Includes one registration, signage at event, and one attendee at the Legislative Lunch.

\$350

AGENDA

Coming Soon!

NABIP bip Magazine: Your Opinion Matters



Your opinion matters! Please take a few minutes to complete our [bip Magazine Readership Survey](#). Your feedback will help us continue improving the content, design, and overall value of *bip* — NABIP's quarterly publication that highlights the work, voices, and impact of our members and the industry we serve.

bip Magazine Readership Survey

Thank you for your time, your insights, and for being a valued part of the NABIP community.

Warm regards,
Jessica Brooks-Woods
NABIP CEO


**National Association of Benefits and Insurance
Professionals**


Phone: 202-552-5060

www.NABIP.org



NABIP PROFESSIONAL DEVELOPMENT






Earn Your REBC® Certification with NABIP–Texas!

Save 50% with the Hollis Roberson Scholarship offered by the NABIP-TX Honorees

Registered Employee Benefits Consultant® (REBC®) Designation



Earning the Registered Employee Benefits Consultant® (REBC®) designation elevates your credibility as a professional. The field of employee benefits continues to evolve rapidly. A year does not go by without new government regulations, new or modified coverages, and new techniques for controlling benefit costs. To best serve their clients, professionals need to have a current understanding of the provisions, advantages, and limitations associated with each type of benefit or program as a method for meeting economic security.

[View the REBC Curriculum](#)

Take your professional expertise to the next level with the Registered Employee Benefits Consultant (REBC®) designation—one of the industry’s most respected credentials. NABIP–Texas is proud to offer this advanced certification program designed to deepen your knowledge of group benefits, healthcare regulations, and strategic plan design.

Whether you're looking to strengthen your consulting skills, stand out in a competitive market, or better support your clients’ complex needs, the REBC® program gives you the tools to lead with confidence and credibility.

Why pursue the REBC® designation?

- Build advanced expertise in employee benefits and health planning

- Strengthen your value to employers and clients
- Demonstrate your commitment to professional excellence
- Enhance your career growth and industry visibility

Invest in your professional future—NABIP–Texas is here to help you get there.

Register Now, Pay Later!

These courses offer a convenient option to reserve your spot today for **\$0.00**. After registering, an invoice will appear in your account, giving you the flexibility to pay anytime before the class date—whether that’s now in **2025** or later in **2026**. You will be notified when the course has reached the minimum of 25 people and you will need to pay after that date.

We need 25 registered participants in order to run the class so spread the word and share with other NABIP-TX Members

Please note: Your invoice must be paid in full by the class date. Unpaid invoices will result in loss of access to the event.

Click the class links below to register

[Live Virtual Self - Funding](#)

February 12, 2026

12pm - 3pm CST

Your cost as a NABIP–TX member will be \$210.10, non–members will pay \$275.00

[Live Advanced Virtual Self - Funding](#)

March 26, 2026

11am - 4pm CST

Your cost as a NABIP–TX member will be \$304.70, non–members will pay \$401.50.

The Value of NABIP-TX Membership

NABIP-TX Members who successfully complete each course can use the **Hollis Roberson Scholarship** to cover even more of the costs of this already discounted REBC Certification program.

Click [HERE](#) to learn more about the Hollis Roberson Scholarship Program and application.

Courses Sponsored by:

As a Health Insurance Program Manager, we design and deploy modern insurance solutions for employers and brokers. Our goal is simple: to infuse value into healthcare by providing high-quality, high-service solutions at the lowest possible cost. Experience the SOTA difference today



About the Instructor

David C. Smith

Senior Vice President, eBen

David C. Smith is the Senior Vice President of eBen and a nationally recognized authority on employee benefits and regulatory compliance. A graduate of the University of North Carolina at Chapel Hill with a J.D. from North Carolina Central University, David began his career as a policy advisor to North Carolina Lt. Governor Dennis A. Wicker, where he helped draft the state's Small Group Health Insurance Reform laws. He later held key roles at Blue Cross and Blue Shield of North Carolina and practiced law full-time before joining eBen.

At eBen, David leads compliance and risk management for large employers and directs strategy and data analysis for self-funded clients. His expertise spans ERISA, COBRA, HIPAA, wellness regulations, and the Affordable Care Act. His work and commentary have been featured in numerous national publications, including *Employee Benefit Advisor*, where he authored the top compliance article of 2014.

A respected national speaker, David is the 2011 recipient of the William G. Wetzel Excellence in Public Speaking Award. He is an active leader within the National Association of Benefits and Insurance Professionals (NABIP) and is certified in the ACA, worksite wellness, HIPAA privacy & security, and self-funded health plans—programs for which he also served as a co-author.

David has been recognized as the 2013 Health Plan Advisor of the Year and twice named to the Insurance Business America Hot 100 list. In 2014, he received NABIP North Carolina's highest honor, the Frederick W. Joyner Distinguished Service Award, for his lifetime contributions to the industry.



NABIP-TX admin@nabip-tx.org www.nabip-tx.org

Absolutely — this is great content already, it just needs **polish, structure, and visual breathing room** ✨
Below is a **clean, newsletter-ready version** with friendly headers, tighter language, and clear calls-to-action.
I'll also note **simple graphic ideas** you can pair with each section.

🏆 President's Triple Crown Program

What is the Triple Crown?

NABIP created the **President's Triple Crown Program** to recognize members whose *individual contributions* help advance the association's mission.

Just like baseball's Triple Crown, this honor celebrates excellence in **three key areas**.

The best part? Unlike baseball, **NABIP's Triple Crown can be achieved every year by every member.**

★ How to Qualify

To earn the Triple Crown within the calendar year (**January 1 – December 31**), members must complete all three:

- ◆ **NABIP-PAC**

Participate in the **\$12 x 12 draft program** *or* contribute **\$150 total** for the year

- ◆ **Membership Growth**

Recruit **two or more new NABIP members**

- ◆ **Advocacy**

Use **Operation Shout** to send **three or more advocacy messages**

👉 **One. Two. Three. It's that simple!**



LPRT — Leading Producers Round Table

In insurance — as in many industries — **top producers stand apart.**

They don't just generate high volume; they deliver **exceptional service**, strive for excellence, and create better outcomes for their clients. Their expertise allows them to produce more business **efficiently and effectively**, resulting in fewer service issues and stronger client relationships.

At NABIP, we believe outstanding producers deserve outstanding recognition.

The Leading Producers Round Table (LPRT)

LPRT is designed to reward NABIP members who are truly **best in class.**

LPRT qualifiers receive:

- ✓ Free or discounted educational opportunities
- ✓ Exclusive services and recognition
- ✓ Peer connection with top producers nationwide

These members help elevate our profession — and NABIP depends on their leadership, expertise, and dedication.

Learn more about LPRT:

<https://nabip.org/membership-resources/lprt-leading-producers-round-table>



Leading Producers Round Table



Start the New Year by Investing in Future Leaders

The New Year brings fresh beginnings, renewed purpose, and the opportunity to invest in what truly matters.

As we look forward to the year ahead, we're reminded of the lasting legacy of Ken Martin — a leader who believed deeply in developing and empowering others.

The Ken Martin Scholarship continues that mission, opening doors for children of NABIP-TX members seeking to grow their skills and strengthen our industry.

The NABIP-TX Honorees Corporation, a non-profit public benefit corporation established and supported by members of the National Association of Benefits and Insurance Professionals, offers the **Ken Martin Scholarship for Excellence in Communication**, established in 2002, for Texas students entering or attending accredited institutions of higher learning.

With your support, opportunities that once felt out of reach become real possibilities.

To inspire your year's first act of generosity, we invite you to hear from one more individual whose life was touched by this scholarship: 🎥 Watch this [New Year testimonial](#) from a past recipient. His journey is a powerful example of what can happen when we start the year by investing in others.

This January, begin the year with impact — donate to the Ken Martin Scholarship today.



This January, we hope you'll consider extending that same gift.

NABIP-TX Honorees is a 501(c)(3) nonprofit organization, and your donation is tax-deductible to the extent allowed by law. No goods or services will be provided in exchange for this donation.

DONATE \$25
DONATE \$50
DONATE \$100
DONATE \$250
DONATE \$500
DONATE \$1,000

For a different amount, please contact us at admin@nabip-tx.org. If you prefer to mail a check, please send along with this [Contribution Form](#).

Thank you for helping us kick off the year with purpose, community, and a commitment to future leaders.

Wishing you a bright and successful year ahead,
NABIP-TX Leadership

NABIP-TX admin@nabip-tx.org www.nabip-tx.org

NABIP Washington Update



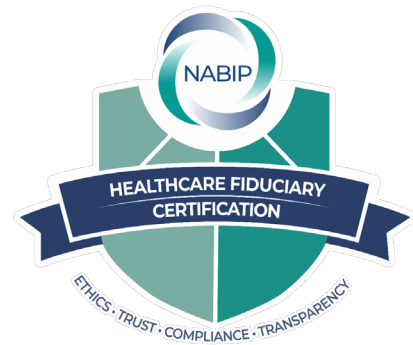
You're reading NABIP's *Washington Update*, a newsletter highlighting key political and regulatory developments at the federal level, authored by Nicole LePetri, director of health policy and engagement. The *Washington Update* is published every Friday.

In This Issue:

1. **New!** Healthcare Fiduciary Certification Program
2. Compliance Corner Webinar: Transparency and PBM Reform
3. Capitol Conference Attendees: Complete Our Feedback Survey
4. Featured Story: Biotech Pushes Back on Trump's MFN Drug Policies
5. Now Available: Our 2025 End-of-Year Impact Report

NEW! HEALTHCARE FIDUCIARY CERTIFICATION PROGRAM

This groundbreaking program establishes a new benchmark for professionalism, compliance readiness, and fiduciary excellence, equipping benefits and insurance professionals to confidently meet rising regulatory expectations and client demands.



[Register here](#) for this series on **April 7, 14, and 21, from 2-4 p.m. ET.**

COMPLIANCE CORNER WEBINAR: TRANSPARENCY AND PBM REFORM

Join NABIP's Compliance Corner committee members Deanna Sizemore and Beth Allen for an update on key regulatory developments affecting agents and brokers. This session will cover current transparency regulations as well as the most recent and anticipated PBM policy changes, related to the Consolidated Appropriations Act (CAA) for 2021 and 2026. Stay informed on what these changes mean for your business and how to prepare for upcoming regulatory shifts.

The webinar will be hosted on **March 19, at 1 p.m. ET.** [Register here.](#)

CAPITOL CONFERENCE ATTENDEES: COMPLETE OUR FEEDBACK SURVEY

All attendees received a feedback survey via email on Thursday, March 5. Please take several minutes to provide critical feedback on this year's programming, hill meeting schedule, conference app, and more! **With new changes to this year's conference, your feedback is more important than ever!**

[Take the survey.](#)



FEATURED STORY: BIOTECH PUSHES BACK ON TRUMP'S MFN DRUG POLICIES

Biotech executives are beginning to publicly oppose President Trump's proposed most-favored-nation (MFN) drug pricing policy as Congress considers whether to codify it. The policy would tie U.S. drug prices to the lowest prices paid in other wealthy countries. Leaders of several mid-sized biotech firms warn the approach could discourage investment and make it harder to raise capital for new therapies. The newly formed Mid-sized Biotech Alliance of America argues that smaller biotech companies are more vulnerable to government price-setting than large pharmaceutical firms with diversified portfolios. The pushback comes as Republican lawmakers weigh whether to advance legislation making the policy permanent.

NOW AVAILABLE: OUR 2025 END-OF-YEAR IMPACT REPORT

NABIP's [End-of-Year Impact Report \(Q3-Q4\)](#) is now available, highlighting the advocacy wins, strategic initiatives, and member-driven progress that shaped the second half of the year. From legislative engagement to professional development advancements, this report showcases the measurable impact NABIP is making on behalf of members and the industry. Explore the latest edition to **see how your association continues to drive results and strengthen our collective voice.**

A Note on NABIP as a Bipartisan Organization

At NABIP, we proudly advocate with one unified voice, transcending political differences to support our industry and clients. Our strength lies in collaborating across party lines to drive meaningful policy solutions. When representing NABIP, we encourage you to [Speak with One Voice](#), aligning with the [NABIP Healthcare Bill of Rights](#) and reinforcing our bipartisan commitment. By distinguishing personal views from our professional roles, we uphold NABIP's credibility at all levels of government.

Thank you for your dedication to this mission—together, we will continue advocating for our members, industry, and communities.



NABIP's 2025 End-of-Year Impact Report



We're proud to present [NABIP's 2025 End-of-Year Impact Report \(Q3 & Q4\): Advancing Our Mission](#) — highlighting the progress we've made together to strengthen our profession, expand our reach, and amplify the voice of benefits professionals nationwide.

From increased membership retention and professional development milestones to advocacy engagement and national recognition, this report reflects the power of our collective efforts and the momentum carrying NABIP into the future.

Here's a snapshot of our shared success:

- **Membership Momentum:** 757 new members; Retention increased to 77.09%
- **Professional Development Growth:** Medicare Certification up 63.8% year over year; \$300,000 generated since June
- **Advocacy in Action:** High-impact federal and state engagement
- **Education & Innovation:** New certification programs and task forces launched
- **Revenue Strength:** \$935,000 in sponsored revenue (12% above projections)
- **National Visibility & Awards:** 20 press releases and multiple *bip* national awards
- **Campaign Impact & Digital Growth:** Chapter toolkits fueled outreach; engagement surged (+189% impressions) with email open rates of 33–45%

Advancing Our Mission

Together, these milestones demonstrate NABIP's continued leadership in advocacy, education, and member engagement – and the growing impact of our nationwide community.

Use it. Share it. Recruit with it.

This report isn't just a recap – it's proof of our shared impact and a powerful tool to showcase the value of NABIP membership to colleagues, partners, and prospective members.

[Read the Full 2025 End-of-Year Impact Report](#)

Thank you for your continued commitment to NABIP's mission and for helping us drive meaningful progress across the industry.

Warm regards,

Susan Rider

President, NABIP

National Association of Benefits and Insurance Professionals

Phone: 202-552-5060

www.NABIP.org



NABIP Resource Hub



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). Meeting locations will change each month.
- ❖ New NABIP-Dallas members can register for their first lunch meeting at no cost.
 - ❖ Email: info@nabip-dallas.org 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!



