



Focusing on Future Success

Mychal H. Walker, Sr. NABIP President –Elect
presents a vision for transforming the organization from relevant to
essential in the healthcare landscape.



Future Forward Momentum



Connect

**Building stronger relationships
across the benefits ecosystem**



Innovate

**Developing new solutions for
evolving industry challenges**

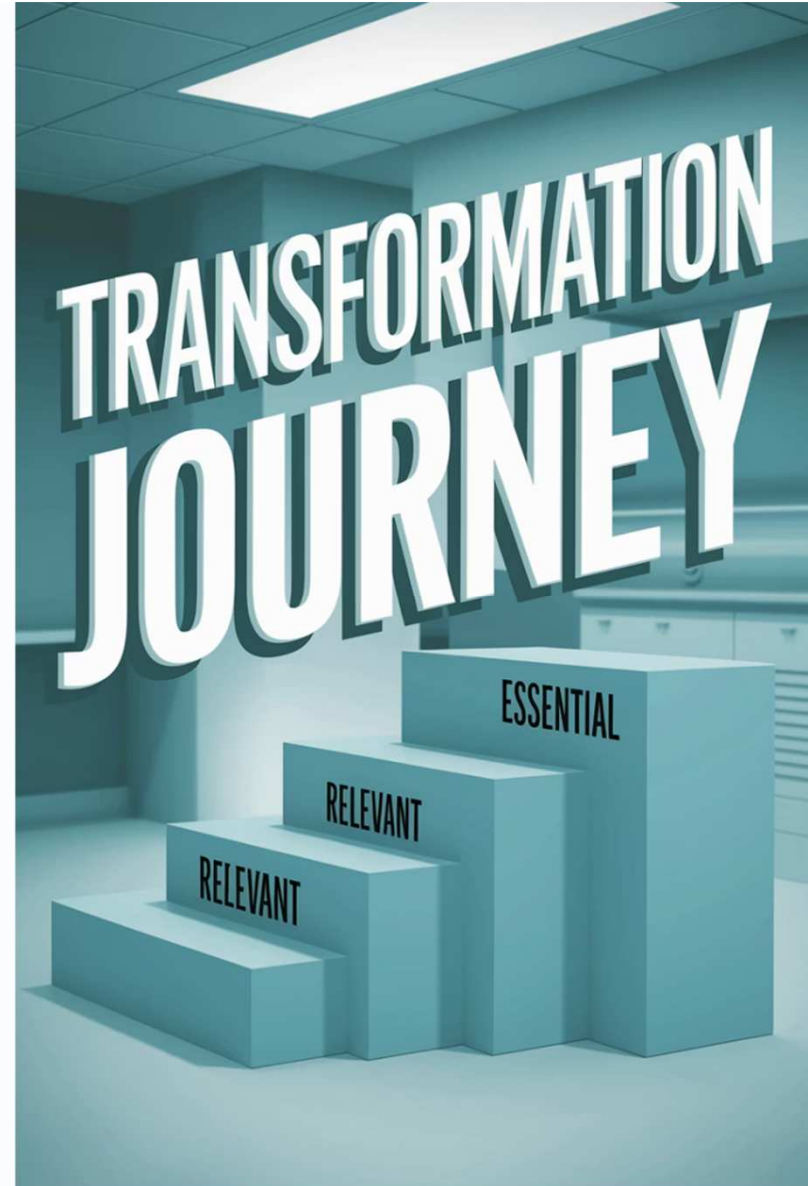


Lead

**Guiding the industry toward
equitable healthcare access for all**

Our Vision for NABIP

Going from *relevant* to ESSENTIAL



Rebuilding Value



Enhanced Communication

Regular updates through newsletters, webinars, and town halls



Community Initiatives

Programs leveraging NABIP's resources for community betterment



Professional Development

Tailored training programs and mentorship opportunities



Digital Resources

Modernized platforms with research databases and AI-driven tools





Transforming Our Reputation in the Marketplace

Current Perception

Our members serve clients nationwide, but consultants aren't always seen as allies.

Needed Change

We must change this viewpoint and showcase the value our members bring.

Bold Approach

We need to be disruptive and futuristic enough to take that risk.



ESSENTIAL to all Americans

"We [NABIP members] are uniquely positioned to lead the transformation of healthcare quality, access, and delivery as well as the future of affordability."

--Jessica Brooks Woods, CEO NABIP

Purpose & Ethos



Mission

To advocate, educate, and empower benefits professionals

Vision

Equitable, high-quality, affordable care for all

Ethos– NABIP Consumer Healthcare Bill of Rights:


- Access and Affordability
- Consumer Empowerment
- Professional Responsibility





Our Ethos: NABIP Consumer Healthcare Bill of Rights



We, the people of the united states, recognizing the importance of access to affordable high-quality healthcare, hereby establish this American healthcare consumer bill of rights. It is our fundamental belief that every individual deserves the right to obtain healthcare that is comprehensive, equitable, and compassionate. This bill serves to protect and uphold these rights for all Americans.

 **Access and Affordability**
We affirm that access to obtain equitable, affordable, high-quality healthcare is a right..

 **Consumer Empowerment**
All Americans deserve meaningful choice, complete transparency, and effective advocacy.

 **Professional Responsibility**
Benefits professionals play a vital role in upholding these fundamental rights.

These principles define our mission, measure our progress, and guide every initiative across our strategic pillars.

NABIP Strategic Framework



This framework aligns all NABIP initiatives toward our shared objectives. Each element builds upon the foundation below it, creating a cohesive pathway to organizational success.

Strategic Pillars

These enduring pillars have historically guided NABIP's purpose. As we grow, we are assessing whether they continue to reflect who we are and how we lead



Membership

Cultivating a strong, diverse, and engaged professional community

Advocacy

Championing meaningful policy and regulatory change

Professional Development

Elevating member expertise through education, leadership, and certification

Strategic Priorities

Where we are focused over the next 2–5 years



Organizational Performance

Strengthen internal alignment, governance, and efficiency



Sustainable Growth & Innovation

Drive long-term financial sustainability



Visibility & Influence

Elevate NABIP's voice via thought leadership, media, and strategic engagement

These Strategic Priorities guide current planning and KPI development

Impact & Influence Quarterly Report



Our Commitment

- Amplify our collective voice in health policy
- Showcase results of advocacy and partnerships
- Equip members with valuable tools

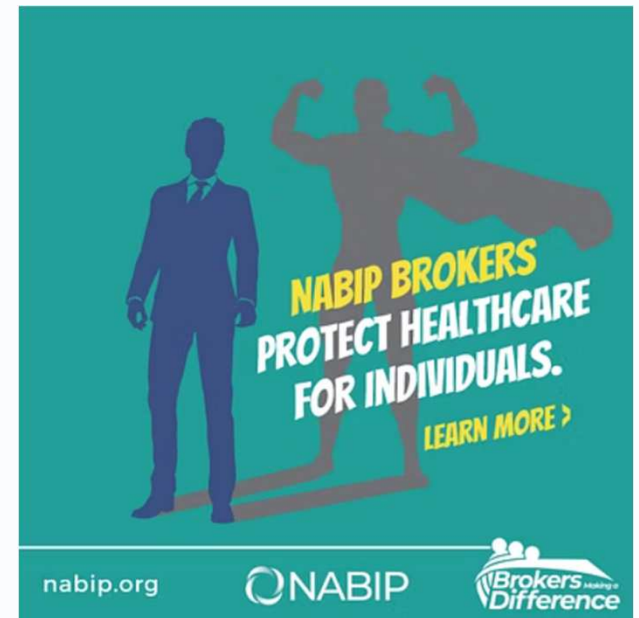
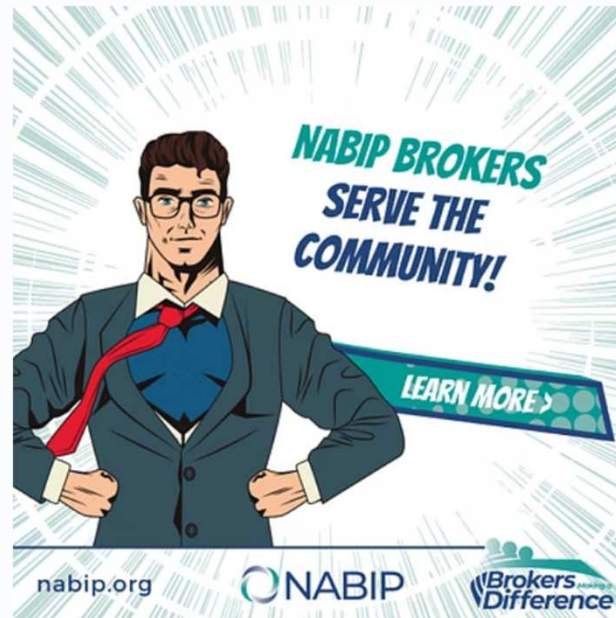


Q1 2025 Highlights

- **Membership Growth:**
 - 746 New Members in Q1, including 307 in March—best in 8 years!
- **Certification Success:**
 - 150% increase in Medicare Certification revenue from 2022 to 2024.
 - Currently Accepted by 50+ national and regional carriers.
 - Current course retires June 9 for annual updates; relaunch set for June 23.
- **Advocacy Expansion:**
 - Over 700 attendees (280 1st timers) gathered in D.C. for Capitol Conference 2025, marking the event's highest turnout in over a decade.
 - Rx model legislation signed into law by Virginia governor.
 - 12,000+ agent and beneficiary surveys, offered firsthand perspectives on the vital role brokers play in the healthcare ecosystem.
 - **Employer-Based Market:** Submitted a robust response to the Department of Labor's FAQ 8 on gag clause compliance.
 - NABIP recommended specific changes to improve access to plan data, ensure provider transparency, and shift responsibility onto service providers.
- **Increased Media Reach:**
 - Issued 12 press releases and secured hundreds of earned media placements across trade and national outlets.
 - 195% increase in social media posts with substantial increases in followers and impressions.
- **bip Magazine:** Our redesigned magazine has been named a Regional Finalist in the 2025 Azbee Awards of Excellence!



Brokers Making a Difference Marketing Campaign Impact



NABIP is executing an aggressive, high-impact marketing initiative to reframe the narrative around the crucial role agents and brokers play in serving Americans.

- More than 12,000 surveys collected—now driving toward 25,000 by Annual Convention
- Equipped brokers with powerful tools including state-specific booklets
- Real broker stories are fueling our advocacy with lawmakers



Your Voice Matters: Help Us Protect Brokers and Consumers

Individual/Marketplace: We know the landscape is shifting, and we understand the real-world challenges you and your clients are navigating in today's evolving individual and ACA markets. As media scrutiny intensifies around the role of agents and brokers, your voice is more important than ever.

Medicare: We're at a critical moment for the Medicare market. With commission cuts impacting agent livelihoods and beneficiary support, it's never been more important to share your voice.

Share your story through our quick surveys:

Individual Plan Agents



Marketplace Enrollee



Medicare Agent



Medicare Beneficiary





BenefitsPRO Advisor of the Year Finalists



NABIP Members Recognized

Three of the five finalists are proud NABIP members: David C. Smith, Rachel Hawkins, and Justin Leader!



Industry Excellence

Celebrating leadership, innovation, and advocacy on a national stage



Upcoming Announcement

Winner will be announced at the BenefitsPRO Broker Expo from May 6-8 in Boston



PD Major Initiatives & Future Strategy



New Online Learning Institute

Enhanced platform for seamless CE tracking and efficient learning



Speakers Bureau Revamp

Providing useful information for chapters and speakers



New Certifications & Training

Fiduciary responsibility and marketing strategies



Workforce Leadership Institute

More training, more talent, more impact

Launch of All-New Online Learning Institute



**The All-New Online Learning Institute –
Built for Your Success!**

LIVE NOW!



A Fresh Look & Powerful New Features!

We've Upgraded Your NABIP Learning Experience!

The All-New Online Learning Institute – Built for Your Success!

- Seamless CE tracking – More accuracy, less hassle
- Enhanced efficiency – Faster, smarter, better learning

Powering the future of Professional Development!

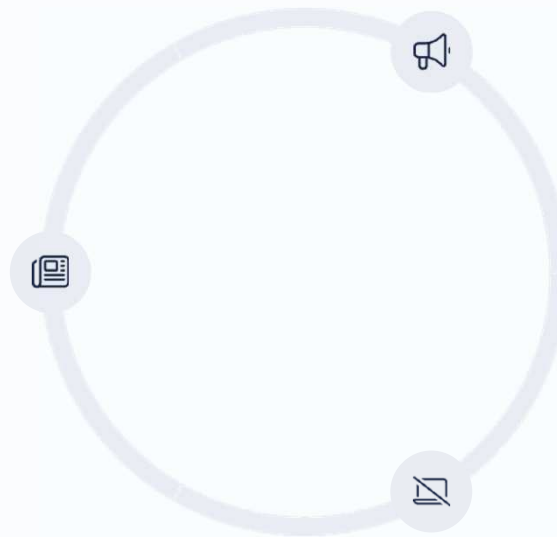


Future Focus: Expanding Influence



Media & Advocacy

- Op-eds & press outreach
- Broadcast media focus
- Social influencers
- Advocacy Offensive



Reframing Brokers' Role

- Countering misinformation
- Strategic marketing
- Advocacy offensive

Digital Growth

- Website enhancements
- Video & interactive content
- Refined email strategy

NABIP has shifted from defense to offense, leading the industry in media coverage - actively shaping the narrative, driving industry conversations, and leading the charge for agents and brokers.

Media Coverage Highlights

PR Newswire® News Products Contact

NABIP Warns of Serious Medicare Disruptions from Aetna & Anthem Policy Changes, Calls for Accountability

Brooks-Woods: New rules could hinder access to counsel for Medicare enrollees

As of last year, there were nearly 4,000 different Medicare Advantage plans for seniors nationwide to choose from. This array of choices is great for the program's beneficiaries. But it can also be daunting. That's why seniors often turn to brokers to help them select the best Medicare plan for their particular circumstances.

Unfortunately, it may become more difficult for beneficiaries to access the expert advisers they've long counted on. The Centers for Medicare and Medicaid Services recently finalized a rule that will cap what insurers can pay agents or brokers at a level well below what it costs them to market and service Medicare Advantage plans.

Centene to end Part D broker payments

Jessica Brooks-Woods, CEO of the National Association of Benefits and Insurance Professionals, said in an Aug. 27 statement the decision to cut commissions "threaten not only the livelihoods of Medicare agents but also the communities they serve and the seniors who rely on their expert guidance."

The association has reached out to Centene leaders, Ms. Brooks-Woods said, as the decision sets a precedent.

"We invite the leaders to talk about how these decisions will affect Medicare beneficiaries and their families," Ms. Brooks-Woods said. "We are asking important questions and looking at all possible options to make sure our seniors and their trusted partners are protected."

NABIP Encourages Consumers to Use Licensed Agents During Medicare's Open Enrollment

Washington, DC – Medicare's Annual Enrollment Period (AEP) is set to begin on October 15 and will run through December 7, 2024. During this time, Medicare beneficiaries have the opportunity to review, update, and make changes to their healthcare coverage for the upcoming year.

"This year brings significant changes to Medicare Part D plans and prescription drug coverage," said Jessica Brooks-Woods, CEO of NABIP. "Beginning in 2025, out-of-pocket costs for prescription drugs will be capped, offering financial relief to many beneficiaries. These changes make it more crucial than ever to partner with a licensed agent or broker who can guide beneficiaries through these updates and help them select the best coverage options for their unique needs."

NABIP Urges Resolution in Nebraska Medicare Advantage Dispute

Washington, D.C. – Jessica Brooks-Woods, CEO of the National Association of Benefits and Insurance Professionals (NABIP), which represents more than 100,000 licensed health insurance agents, brokers, consultants and benefits professionals nationwide, today issued the following statement:

"Recent disputes between Medicare Advantage carriers and Nebraska hospitals have left several hospitals in the state no longer accepting Medicare Advantage patients. These disruptions place seniors, particularly those with complex medical needs, in a vulnerable position, creating uncertainty and gaps in care for Medicare beneficiaries who rely on Medicare Advantage coverage."

NABIP Calls for Industry Action to Protect Medicare Guidance and Community Contributions

PR Newswire
August 27, 2024 • 2 min read



WASHINGTON, Aug. 27, 2024 /PRNewswire/ -- The National Association of Benefits and Insurance Professionals (NABIP) CEO Jessica Brooks-Woods issued the following statement regarding the recent decision by some health plans to discontinue Medicare prescription drug (Part D) compensation to health insurance agents:

NABIP leads the industry in media coverage with nearly 50% of total industry mentions—double NAIFA and significantly ahead of HIFA.



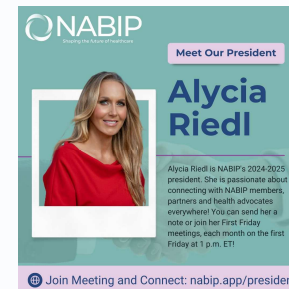
Cutting Edge Information and Ways to Connect!



NABIP Weekly Insider
Stay updated with the latest
industry news and NABIP
initiatives



Washington & State Updates
Critical policy information affecting your
business



Tune In & Learn: Webinars & Podcasts

Compliance Corner Webinars

Medicare Insider Moments

LPRT Exclusive Masterclass Series

Agency Growth Accelerator Workshops

Power Hour

Developing Your Personal Brand Workshops

Beyond Compliance Webinars



APP STORE



AI-Powered Solutions

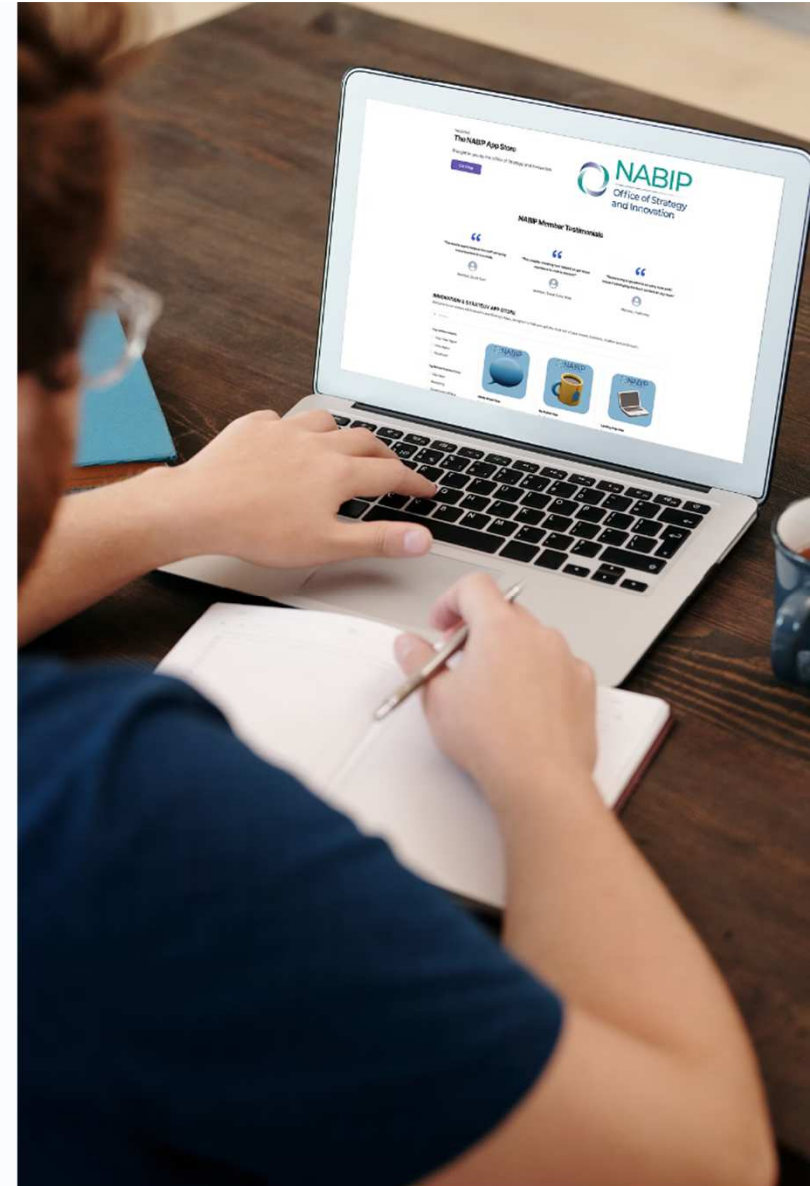
Discover a suite of tailored applications designed to streamline your responsibilities as a chapter leader, agent, or valued NABIP member.

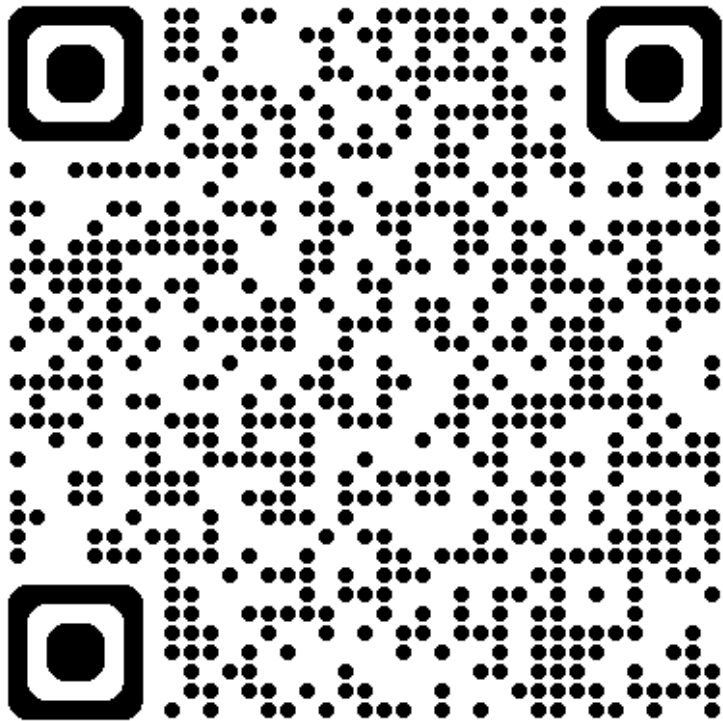
Enhance Your Experience

From crafting compelling media for your chapter to refining your professional bio and developing captivating landing pages.

Start Exploring Today

Unlock new possibilities for efficiency and productivity at <https://nabip.app/apps>





NABIP Find An Agent Tool



State and Zip Code

Find agents in specific geographic areas



Practice Area

Search by specialization to meet client needs



NABIP Certification

Locate agents with specialized credentials



HIE State Certification

Find agents certified for Health Insurance Exchanges

Partner with fellow NABIP members in your community to support your clients!

Legislative Update

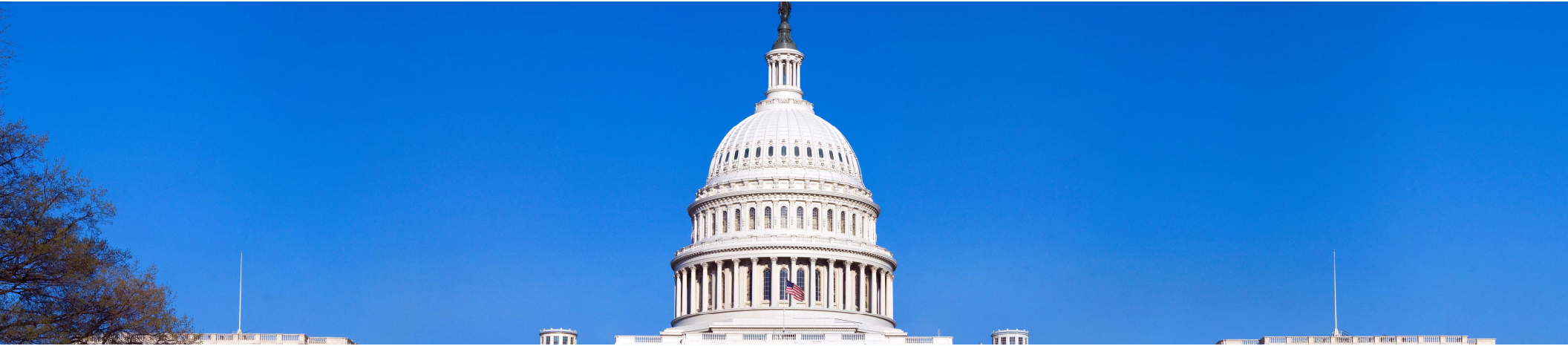


Current Legislation
Key bills affecting healthcare and benefits



Policy Priorities
NABIP's focus areas for advocacy

Member Action
How you can support our legislative efforts



Overview: Legislative Strategy



Direct Lobbying

By NABIP's GR Team and members



Coalition Lobbying

With like-minded stakeholders





Grassroots Lobbying

Through Operation Shout!

Maintaining relationships with your state and federal representatives strengthens our advocacy efforts!



Overview: Regulatory Strategy

-  **Proposed Rules**
Monitor relevant regulatory proposals from federal agencies
-  **Comment Letters**
Submit high-level responses to CMS, HHS, DOL, IRS, and Treasury
-  **Collaborative Approach**
Work with legislative working groups to craft effective comments
-  **Documentation**
Access all comment letters in the Advocacy section of our website

Recent NABIP Wins

Medicare Advocacy

Successfully influenced policy to protect beneficiary access to agent services

Rx Model Legislation

Signed into law by Virginia governor

Capitol Conference

Over 700 attendees with 280 first-timers, highest turnout in a decade

Employer-Based Market

Submitted robust response to DOL's FAQ 8 on gag clause compliance





Recent NABIP Advocacy Wins

- Employer Reporting Improvement Act signed into law
- Mental Health Parity Rule
- Blocked 15 single-payer and public option proposals at the state-level
- 9-month extension of Medicare telehealth flexibilities
- Increased member advocacy engagement, including 4,300+ messages to legislators via Operation Shout! campaigns
- Over 15,000 agent and beneficiary surveys that shape legislative, regulatory, and public relations efforts



Our Federal Talking Points at a Glance



Tax Treatment

Protect preferred tax treatment for healthcare benefits



Medicare

Defend access to critical guidance and strengthen coverage for seniors



Bipartisan Package

Pass the popular bipartisan healthcare package from the 118th Congress



Consumer Protection

Leading with consumer protection and a right to access to benefits professionals

Value of the Agent: Key Statistics

75%+

Marketplace & Medicare

ACA enrollees and Medicare beneficiaries rely on agents

88%

Small Businesses

Depend on agents to navigate employee benefit options

153M

Americans

Rely on employer healthcare, most with broker assistance

10+

Years Experience

Most agents have extensive healthcare expertise



Congress is Back in Session Following Two-Week Break

Budget Reductions & Medicaid Under Scrutiny

- **\$1.5 trillion in federal cuts are necessary; Medicaid is expected to be affected**
- **Energy & Commerce: \$880 billion in savings anticipated, with work potentially commencing next week.**
- **The Oversight Committee plans to review six healthcare bills**
- **Committees are targeting completion by May 9**
- **Objective: Deliver the final bill to Trump by Memorial Day**

Federal Budget Savings: ACA Tax Credits & Employer Plans

- **Enhanced ACA premium tax credits expire end of 2025 without action**
- **Expiration would significantly raise premiums for many.**
- **Employer-sponsored insurance tax treatment also under review.**
- **Issues fall under Ways & Means and Senate Finance Committees.**
- **NABIP and coalition partners actively engaged on both fronts.**

Congress is Back in Session

ACA Preventive Services Under Supreme Court Review

- **Major case challenges ACA's preventive services requirements**

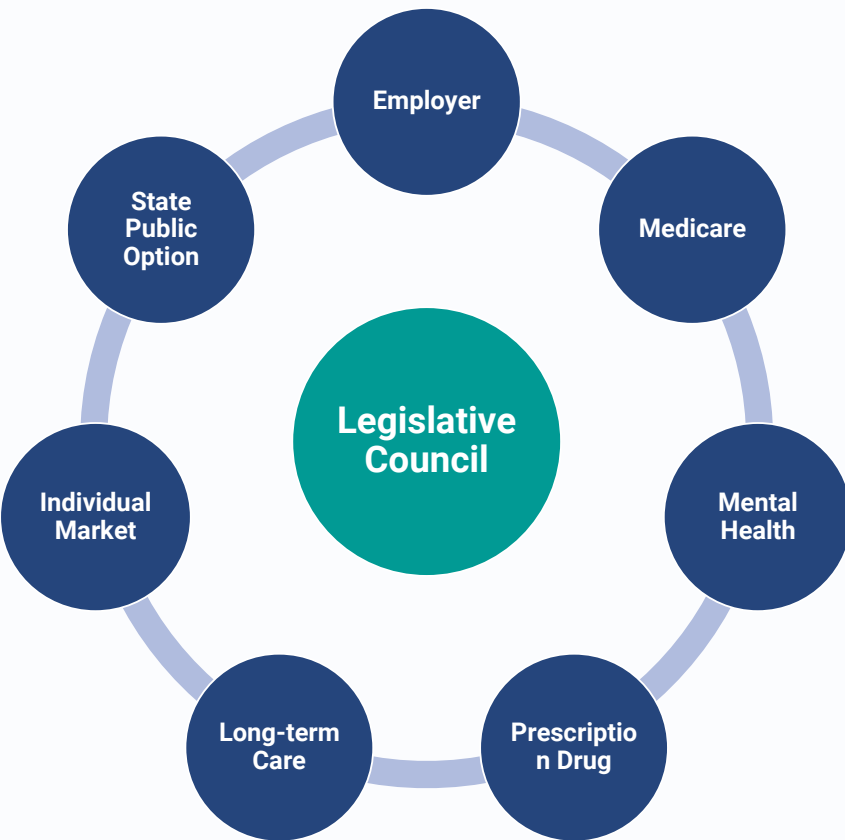
Texas Court Ruling Impacts Employer Mandate Penalties

- **Only HHS can certify penalties; IRS certifications invalid**
- **Refunds required where IRS improperly assessed penalties**
- **HHS regulation delegating authority to IRS struck down**

Member Advocacy: Protect ACA Credits & Employer Coverage

- **Urge House members to support premium tax credits and employer plans**
- **Prioritize outreach to new members of Congress**
- **Highlight the impact on affordability and access for Americans**

Members Influencing Legislative Priorities



- 1 — Legislative Council
7 topical working groups and representatives from 8 NABIP geographical regions
- 2 — Working Groups
Focus on areas most important to NABIP members
- 3 — Member-Driven
Members like you set advocacy priorities for the year ahead
- 4 — Application Deadline
Applications due May 15th!

Get Involved!

Consumer Protection First

Leading with consumer protection in every conversation is important!

Stay Informed

Keep up with the latest policy developments and NABIP positions

Take Action

Participate in Operation Shout! and contact your representatives



Surveys

Meet Your Legislators and State DOI

Log Your Connections & Meetings

Apply to Working Groups & Chapter Engagement



Meeting With Your Legislators

Year-Round Engagement

Have conversations with federal and state legislators throughout the year

Strategic Timing

Schedule meetings during August recess and other times when legislators are in district

Resources Available

Visit NABIP's website for information about scheduling, talking points, and follow-up

Log Your Meetings

Complete the survey to document your lawmaker appointments

Log Your Connections & Meetings!

Why It Matters

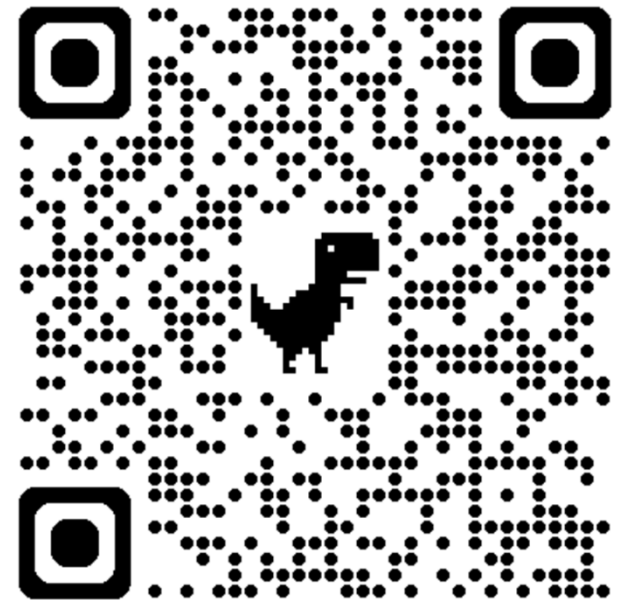
Tracking our collective advocacy efforts helps demonstrate NABIP's reach and influence

What to Log

- Log all meetings with lawmakers
- Report your connections to legislators
- Document follow-up actions

How to Report

Let NABIP know using the QR Code!



Over 15,000 Surveys completed!

Survey Stories

```
graph TD; A[Survey Stories] --- B[Meetings on the Hill]; A --- C[Agency Conversations]; A --- D[Letters to the Hill]; A --- E[Comment Letters];
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**Meetings on
the Hill**

**Agency
Conversations**

**Letters to the
Hill**

**Comment
Letters**

These surveys provide critical data for our advocacy efforts, demonstrating the real-world impact of brokers and agents in the healthcare ecosystem.

State-level Medicare Testimonials

Here's how NABIP Agents and Brokers Make a Difference in Maine

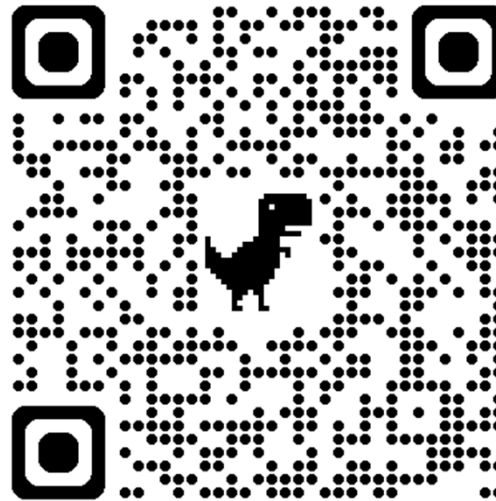
In the Words of Medicare Beneficiaries

Navigating the Complexity of Medicare:
Support in Selecting the Right Plan

"My first time getting coverage, my agent took the time to explain and helped select the best option for me, so glad I found her."

"My agent helped my daughter navigate my care from hospital, nursing home to home after my stroke. He provided expertise on what to say and to whom each step in the process, not to mention, how to handle billing errors to their speedy resolution, which ended up saving me thousands of dollars."

"I have been helped multiple times to sign up for health care coverage by my agent. The complicated rules and qualifications are like reading Greek to me - and she helped me navigate and advise me to make informed choices. She helped me when I turned 65 to sign up for Medicare and was especially helpful because she knows our local medical system, hospitals, doctors. It would have been painful and challenging without her."

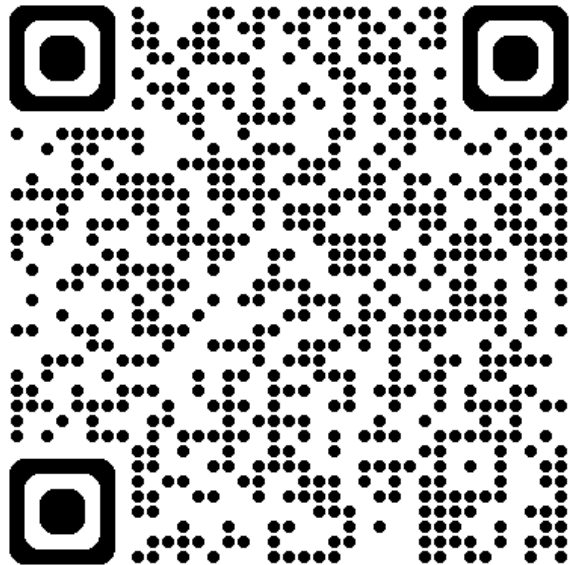


Real-world examples of broker impact on Medicare beneficiaries

State-Specific Data
Customized reports showing local impact of Medicare agents

Advocacy Tool
These testimonials help lawmakers understand the value brokers provide

Check out the NABIP Website!



Advocacy Resources

- **Written testimony to Congress**
- **Comment letters to agencies**
- **Policy and position papers**

Action Tools

- **Medicare and ACA Marketplace surveys**
- **Talking points for government meetings**
- **Operation Shout! campaigns**

State & Coalition Resources

- **NABIP state policy resources**
- **Coalition efforts documentation**
- **Legislative tracking tools**

Annual Convention 2025



Miami, FL - June 28–July 1, 2025

An elevated Gordon Awards Gala, engaging professional development, and unforgettable Miami-themed events!



Connect with Leaders

Engage with leadership from health insurance organizations and innovative speakers from across industries



Perfect Blend

Balance educational sessions and networking with relaxation and inspiration

**The Harold R. Gordon
Annual Awards Gala**

*Celebrating Leaders Who
Shape the Future of Healthcare*

**Monday, June 30th
7 p.m. – 11 p.m.**

*Join Us for this
Black-tie optional event*

Tickets are required

NABIP
ANNUAL CONVENTION

**FUTURE
FORWARD**

Connect, Innovate and Lead
June 28 - July 1, 2025
Fontainebleau Hotel | Miami, FL

NEW MEMBER AMBASSADOR

TRAILBLAZER WITH IMPACT

EMERGING LEADER

**DISTINGUISHED SERVICE
AWARD**

AND THE MOST PRESTIGIOUS...

HAROLD R. GORDON AWARD

RECOGNIZING LIFETIME ACHIEVEMENT





FUTURE FORWARD

Connect, Innovate and Lead

Come Join Us for the Fun and Excitement in Miami!

An Elevated Gordon Awards Gala, Engaging Professional Development
and Unforgettable Miami-Themed Events!





Stay Connected with NABIP!



Your Voice Matters App
Share thoughts transparently to drive strategy and innovation.



NABIP Instant Answer App
Get quick AI-generated responses to your questions.

Social Media



Follow us on LinkedIn, Facebook, X, and Instagram for the latest updates and industry news.



Questions?

Thank you for joining today's presentation. We welcome your questions about NABIP's Future Forward vision and how you can get involved.

