

President's Message

The time has arrived – July officially starts the 2023–2024 NABIP-Dallas Board year and I am excited and honored to take on the role as your President. Jennifer Stanley has left enormous shoes to fill and I am so proud of all the work she has done over the last two years to lead our chapter. Jennifer has been extremely helpful in conducting ongoing succession planning meetings to ensure a successful transition as we move into the new board year. NABIP-Dallas has big plans for the year and a stellar team of individuals focused on state and federal legislation tied to our industry, membership and retention efforts, event planning, communications, recognizing our chapter with state and national awards, sponsorship opportunities, and public service efforts.

I have been a member of the association since 2017 and have served on the NABIP-Dallas (formerly DAHU) Board since 2017 in Legislative, Professional Development, VP, and President-Elect roles. I also volunteered for the state chapter and Region 6 leadership committee as the Vanguard Chair. My favorite part about being a member of NABIP is getting the chance to connect with so many industry leaders across the country and having a large network that I can depend on. I look forward to growing our chapter's membership and providing value through our monthly meetings, social events, and charity initiatives throughout the year.

- Taylor B. Kirkhart

Upcoming Event: Sales Rock Star Summit!

July 19th at VouV

Join us on July 19th for the Sales Rock Star Summit and learn how to **Sell the Problem, BE the Solution**. We are bringing together industry rock stars to help you enhance your Medicare and Group Employee Benefits sales skills, and breathe new life into your consulting services. Our esteemed lineup of speakers will share valuable insights to help transform your sales process into a relationship-building endeavor rather than a transactional one.



Greg Gurbikian
Sell The Problem Not The Solution



Cliff Stubbs
Medicare - Don't Get Caught with Your Pants Down!



Craig Horton
Maximizing Medicare in Small Employer and TPA Populations



Kat Tennant
Premiere Senior Advisors a Division of Applied General Agency



Sandra Gebhardt
Your Brand, Your Story, Your Identity

[Registration](#) includes lunch & happy hour! Register for the full day (starting at 8:30) or lunch only. The first 100 registrants will receive a complimentary signed copy of the book *Sell the Problem Not the Solution*.

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June 2023

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Upcoming Event: NABIP-Dallas August Meeting

August 16th at VouV

“What Got Us Here Won’t Get Us There” – The Changing Landscape of Employee Benefits by Erin Issac

Wednesday, August 16 at VouV Event Center
4445 Sigma Road, Dallas, TX 75244

[Register Here](#)



Introducing the NABIP-Dallas 2023-2024 Board of Directors



Photo by: Howard Deihl

President: **Taylor Kirkhart**
Secretary: **Cindy Goodman**
Awards Chair: **Carmen Freeman**
Legislative Chair: **Claire Pancarz**
Communications/Media Chair: **Jared Leshin**
Sponsorship Chair: **Suzanne Crim**
Trustee: **Rita Rolf**

Past President: **Jennifer Stanley**
Treasurer: **David Weber**
Awards Committee Chair: **Caitlin Mathis**
Membership Chair: **Karen Burkholder**
Public Service Chair: **Kim Waters**
Vanguard Chair: **Stephen Snyder**
Executive Assistant: **Patricia Pattison**

Welcome New NABIP-Dallas Members (January – May 2023)

Gary Klein
Connor Love
Kim Waters
Cameron Haegele
Jessica Lovett
Elizabeth Greenleaf
Steve McLaughlin
Marlene Huerto
Chris Gaston

Tommy Dorsey
Mark Cunningham
David Crockett
Kimberly Ferrusca
Don Davis
Amanda Walker
Letti Valero
Kyle Estep
Sterling Worrall

Mark Keck
Madelyn Jordan
Tracy Berwick
Franklin Anding
Jason Sandler
Tessa Larson
Ashley Blocker
Keri Harvie
Lisa Lewis

Denise Hart
Jared Leshin
Emily Faimoa
Karl Von Schwatz
Eric McShannon
Elisa Garfias
Geoff Goff
Michael Binyaminov
Latoya Savala

Member Spotlight: Caitlin Mathis



Caitlin attended her first NABIP-Dallas meeting in January 2023 and is serving on the Board of the Directors on the Awards Committee. She has lived in the DFW area most of her life, and has always enjoyed staying active and being outdoors. She graduated from UNT in December 2019 with a bachelor's degree in entrepreneurship. Shortly after graduating, Caitlin moved to New Mexico where she found an Administrative Assistant job for an Insurance Broker in Albuquerque, NM. This is when Caitlin began her career in insurance, and where she learned a passion for helping others – especially with their Insurance needs.

Caitlin considers herself lucky to have worked under an experienced broker to teach her the ropes, and is grateful to her today for taking the time to teach her properly as they were dealing with Marketplace, Medicare, and Group clients. She ended up moving back to TX after about 8 months in NM, and shortly after her position went fully remote. Outside of work, she enjoys lifting weights, moving my body, spending time with family, reading, and walking her dog, Atom. Caitlin is also an advocate for stalking awareness with a non-profit called, SPARC!

Caitlin started with TexCap in December of 2022, as a Client Service Representative and has been loving it ever since. She says, “Here at TexCap, we do more than just Benefits. We’re helping Employers and their Employees navigate the Health Care system, which we’re all aware isn’t easy. I assist mostly on the administrative side of things processing enrollment changes, updating our group benefit documents, and walking employees through Open Enrollment. I came to TexCap looking for growth and knowledge, and they didn’t disappoint. They provide us with a plethora of resources/CE we need to stay on top of the changes that occur in the Insurance world. I am also lucky to be working alongside other brokers who provide me with mentorship. I can’t wait to see what the future will bring for me here at TexCap.” We are thrilled to have Caitlin on board as a NABIP-Dallas member and member of the Awards Committee!

Photos from the NABIP-Dallas June Meeting by Howard Deihl



Legislative Updates from the NABIP-Texas Lobbyists

The Texas Legislature adjourned their regular session back on Memorial Day, nearly one month ago. But when lawmakers were not able to come to a compromise on giving Texans property tax relief, Gov. Greg Abbott called them back into an immediate 30-day special session which ends later this week. We heard today that the Texas House GOP Caucus has advised members to expect another special session on June 28th: "Expect to be called back for a second special session this Wednesday afternoon," according to the memo.



Presumably, the special session "call" or agenda will include the not-yet-finished property tax relief, perhaps with broader language than the first called special session. The call could also include other topics including education, border security, or any of the topics covered by bills vetoed by Gov. Abbott when his veto proclamations said nothing is as important as property tax relief or education freedom (code for vouchers). We don't anticipate anything related to insurance, health care or employee benefits to be on the special session call.

NABIP Names Jessica Brooks-Woods as Incoming CEO

Following an extensive national search, Jessica Brooks-Woods, MPM, PHR, has been appointed as the incoming CEO of the National Association of Benefits and Insurance Professionals (NABIP), assuming her role on September 1, 2023. In her capacity as CEO, Brooks-Woods will provide strategic guidance and leadership to the staff in Washington DC and oversee the representation of licensed health insurance agents, brokers, general agents, consultants and benefits professionals through 200 state and local chapters across the country.



With a wealth of experience as a business leader, health equity advocate and benefits expert, Brooks-Woods is well-positioned to drive NABIP's mission forward. "Jessica brings nearly 20 years of experience, not only as a business leader but also as a health equity

advocate and benefits expert, to NABIP," said NABIP President Eric Kohlsdorf. "The Board looks forward to working with Jessica as the association continues to shape the future of healthcare."

"I'm honored and thrilled to join NABIP as its incoming CEO. With our shared commitment to high-quality, affordable healthcare, I am excited to collaborate closely with the talented staff, dedicated members and esteemed Board of Trustees. Together, we will make a significant impact, enhancing the lives of millions across the nation," said Brooks-Woods.

NABIP News: House Passes Bill to Ease ACA Employer Reporting

The House passed **H.R. 3801** this afternoon, also known as the Employer Reporting Improvement Act. This bill is based on the Commonsense Reporting Act, legislation that NABIP has supported for several years. **While the bill has successfully passed the House, it must be considered by the Senate and signed by the president prior to becoming law.** Read NABIP's press release on the bill's passage [here](#) and about the details of the bill [here](#).

H.R. 3801 will provide much-needed relief for employers seeking to comply with the reporting requirements under Section 6055 and 6056 for enforcement of the ACA's individual and employer mandates. This bill is a testament to the work our NABIP membership did advocating on our federal priorities in their respective Hill meetings during NABIP's Capitol Conference earlier this year. NABIP has long sought these reforms and we look forward to advancing this as a bipartisan solution to address challenges being faced under the health-reform law.

NABIP is grateful to bill sponsors Congressmen Adrian Smith (R-NE) and Mike Thompson (D-CA) for supporting this much-needed piece of bipartisan legislation, and we look forward to working with our allies in the Senate to get it to the president's desk. Be on the lookout for an Operation Shout when the bill is considered by the Senate so that we may finally ease the compliance burden that the employer reporting process creates for you and your clients!

NABIP Member Resources/Pointers

- ❖ [NABIP](#) Membership gets you access to local chapter membership through [NABIP-Dallas](#) and access to the state chapter membership through [NABIP-Texas](#).
- ❖ 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 get their first lunch meeting at no cost. Email dahu.org@gmail.com to confirm your registration.
- ❖ The NABIP-Dallas chapter makes efforts to offer continuing education (CE) credit as often as possible. The [Lone Star \(Virtual\) Chapter](#) frequently offers online CE webinars at no cost for NABIP-Texas members.
- ❖ Links to the NABIP-Dallas [Chapter By-Laws, Policies & Procedures](#), and [National Resources](#) for Chapters.



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