



## **Innovating for a Changing Landscape – Medicare, Individual and Employer Coverages.**



**WELCOME TO THE NABIP SUBURBAN CHICAGO EXPO**  
**May 7, 2025**  
**10:30 a.m. – 4:30 p.m.**

**Bridges of Poplar Creek**  
**1400 Poplar Creek Drive, Hoffman Estates, IL.**



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## **AGENDA**

**10:30 – 11:30 – Registration and visiting sponsors**

**11:00 – 11:15 – Department of Insurance Upcoming Changes - State Based System**

**11:30 – 11:40 – Welcome**

**11:40 – 12:10 – Michael Gende of Guarantee Trust Life Hospital Indemnity and Home Health Care Plans**

Medicare Advantage (MA) Plans offer valuable coverage, but gaps in out-of-pocket costs can leave beneficiaries vulnerable. This session will explore how Hospital Indemnity and Home Health Care plans can provide financial protection and flexibility for MA clients, helping brokers deliver more comprehensive, tailored solutions to their clients.

**12:10 – 12:40 — Break/Network with Sponsors**

**12:40 – 01:20 — Medicare Panel**

**Panelists: Bryan Rizzo/Humana, Teresa Lara/Zing, Robert Perretta/BCBSIL, and Robert Jones/Globe Life (United American)**

The Medicare landscape is constantly evolving, presenting both challenges and opportunities for brokers and carriers alike. This expert panel discussion explores the latest industry trends, policy updates, consumer demands, and strategies for broker success in today's competitive Medicare market. Attendees will gain valuable insights to enhance their Medicare practice, better support clients, and stay ahead of regulatory changes.



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## **AGENDA**

**1:20 – 02:20 – Keynote Speaker/LUNCH**

**KEYNOTE: Andy Neary – The Insurance Agency Sales Playbook: The 3-Step Process to Go from Unknown to Unstoppable**

Key takeaways:

- How To Differentiate Yourself from the Competition
- How to Utilize the 5-Star Prospect Profile to Identify Your Ideal Prospects
- How To Build a Marketing Message That Attracts Top Prospects
- How To Create the Expert Credibility You Need To Win Your Dream Clients

**2:20 – 03:00 – Group Panel**

**Panelists: John Cleary/Allstate, Lianne Cascio/Benefit Mall, Robin Przybylski/EM Benefits, and Scott Castellanos/BCBSIL**

This dynamic panel discussion brings together industry leaders to explore the evolving landscape of group benefits and what it means for brokers, employers and employees. Our experts will address key industry trends, challenges, and opportunities, providing valuable insights to help brokers stay competitive and deliver greater value to their clients.

**3:00– 03:35 – Break/Network with Sponsors**



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## **AGENDA**

### **3:35 – 4:05 – Speaker – Russell Dixon – Voluntary Supplemental Insurance Benefits**

This session explores the growing importance of worksite benefits as a strategic tool for employers and an opportunity for brokers to expand their portfolios. By leveraging insights from the top15 carriers and industry studies, we'll highlight key trends, best practices and proven strategies to maximize value for both employers and employees.

### **4:05 – 4:30 – Closing and Raffles**

**NABIP - Suburban Chicago THANKS YOU for attending  
our EXPO!**

**THANK YOU TO OUR SPONSORS!!**





## **Michael Gende**

Michael is a Midwest Regional Sales Manager at Guarantee Trust Life. It is his ninth year with GTL and 18th year in the insurance field.

He holds a Associate Degree in Business and a Bachelors degree in Marketing.

His position allows him to oversee Agents' and provide them with training and assistance as needed to sell GTL products. He is known for his unrelenting positive attitude, as he has never seen a situation that did not have some ray of sunshine peeking through! He is an empath, which explains his ability to serve his agents so well.

Gende loves his position at GTL, though he lives for his time out of the office! He leads an active life playing all sports, including riding dirt bikes, and barefoot water skiing!

"Everybody dies, but not everybody lives. Let's live!" is an original quote he made up and follows!



**Bryan Rizzo**  
**Broker Manager-Greater Chicago Area**  
**Humana**



**Teresa Lara**  
**Broker Project Manager**  
**Zing**



**Robert Peretta**  
**Director Individual Medicare Sales**  
**HCSC**



**Robert Jones**  
**Regional Sales Director**  
**United American/Globe Life**



## **ANDY NEARY**

**Speaker, Author, Podcast Host & Coach to the Insurance Industry**

Andy is a former professional baseball player turned insurance advisor and business coach. As an undersized pitcher in the Milwaukee Brewers organization, Andy saw, first-hand, what it took to excel at the sport's highest level. Lacking the ideal measurements for a pitcher, Andy leveraged unshakable drive and discipline, and a set of consistent daily habits to become a professional athlete.

Today, Andy utilizes the lessons he learned on the mound to help insurance professionals build the mindset, skills and habits needed for success. In 2019, he founded Complete Game Consulting, a coaching and training company. He routinely advises insurance professionals and agencies on marketing and branding strategy and is a sought-after keynote speaker for events and podcasts dedicated to helping insurance professionals reach their potential.

Andy is Host of the *Bullpen Sessions: A Podcast For Insurance Professionals Driven To Reach Their Full Potential*. Each week, Andy interviews subject matter experts and shares tips from the Complete Game Marketing Playbook to give professionals the mindset and tactics it takes to win today.

Andy was also a contributing author to the Amazon Best Seller, *Breaking Through the Status Quo: How Innovative Companies Are Changing The Benefits Game To Help Their Employees and Boost Their Bottom Line*.

*Andy resides in South-central Wisconsin*





**JOHN CLEARY,  
AREA VICE PRESIDENT,  
ALLSTATE**



**LIANNE CASCIO,  
BENEFIT SALES EXECUTIVE,  
BENEFIT MALL**



**ROBIN PRZYBYLSKI,  
CHIEF MARKETING OFFICER,  
EM BENEFITS**



**SCOTT CASTELLANOS, SENIOR  
MANAGER, SMALL GROUP SALES &  
ACCOUNT MANAGEMENT  
BCBSIL**



**Russell Dixon**  
**Insurance Broker. Legislative Advocate,**  
**Educational Instructor,**  
**SME – Voluntary Supplemental Insurance Benefits**

Russell has been in the insurance industry for over 21 years and focuses on developing sales organizations. He has extensive skills in recruitment and team building. As an independent producer, he continues to assist brokers, employers and consumers with finding the best options for insurance and voluntary benefits from some of America's leading insurance providers.

Russell joined the NABIP (formally NAHU) in 2004 and continued his strong and active support of this agent trade association and the insurance industry as a whole by volunteering to serve on various board and committee positions. Serving on both the local and state level including previously serving 2 terms as a local DuPage Chapter President and later as a ISAHU State President. On a regional and national level, Russell previously served 4 years on the Education and Professional Development committees for NAHU working to craft and guide continuing education and certification opportunities for agents across the country.

Over the last 17 years, Russell has worked on behalf of NABIPIL (formally ISAHU) and their coalition partners IIA of IL and NAIFA and several other industry trade groups in drafting and representing the legislative positions of insurance producers to help improve the markets and continue to serve the Illinois consumer. This has included meetings with CMS, HHS and various Senators and Representatives both federal and state from across Illinois including the Governor's staff and various department heads within the Illinois Department of Insurance to voice the interests and concerns of all licensed producers on legislative issues or regulations that may affect Illinois.

Russell continues to serve the insurance industry by leading instruction of continuing education classes and pre-license instruction classes in Illinois as well as being a featured speaker/moderator at various trade association and consumer events and is widely regarded as a subject matter expert on voluntary supplemental insurance benefits, enrollment communication & engagement strategies, and agency sales development.



THANK YOU TO OUR SPONSORS!!