



2026

11th Annual

Day Of Education

May 14, 2026

McAllen Chamber of Commerce

McAllen, TX

www.nabipsotx.org

UPDATED AGENDA

AGENDA

Hello and welcome to our Day of Education (DOE) and 5-Hours of CE Credit.

Welcome to an exciting opportunity to connect, learn, and grow!

On behalf of the National Association of Benefits and Insurance Professionals – South Texas Chapter (NABIP-SOTX), I am thrilled to invite you to our Single-Day Conference designed to bring together the best in our industry.

This event is more than just a meeting—it's a day packed with innovation, collaboration, and compliance insights. Insurance professionals will have the chance to earn 5 hours of Continuing Education (CE) credit, while vendors can showcase their solutions and build relationships with industry leaders and decision-makers.

Our agenda will feature fresh ideas, legislative updates, and compliance strategies that matter most to your business. Plus, enjoy delicious meals, networking opportunities, and exciting door prizes throughout the day.

Whether you're looking to expand your client base, stay ahead of regulatory changes, or simply connect with peers who share your passion for excellence, this conference is the place to be.

Don't miss out—secure your spot today and be part of shaping the future of our industry!
We look forward to seeing you there!



Vicky Vella

President, NABIP-SOTX

Why Sponsor Our DOE?

On behalf of NABIP-SOTX, it is with great enthusiasm that we extend a warm welcome to you as a valued member or guest of our DAY OF EDUCATION regarding,

ETHICS/VETERANS/FMO'S

This event will be held on May 14, 2026 at The McAllen Convention Center, McAllen TX, and we are excited to have you join us for this groundbreaking experience.

This symposium promises to be a pivotal moment in the insurance sector, where leading experts, innovators, and professionals will come together to explore how gain clarity and stay compliant in their field of service.

We greatly appreciate your support, and we look forward to seeing you at the symposium. Together, we can foster meaningful dialogue and collaboration, driving innovation that will shape the future of the insurance industry. If you have any questions or need additional information before the event, please don't hesitate to reach out to our team at nabipsotx@gmail.com

Thank you once again for your generous support and commitment to the advancement of the insurance industry. We are thrilled to have you on board.

CE Classes *Subject To Changes*

1 Hour CE



Ali Panjwani and Amit Jiwani

Course number - 140879

Explain AI to Your Clients (Before AI Does)

1 Hour CE - Ethics



Ron Byrd - SOTX

Course number - 144001

Ethics vs Morals, You Decide

This course provides insurance professionals with a clear understanding of the distinction between ethics and morals and how both influence decision-making in the insurance industry. While morals are shaped by personal beliefs and values, ethics are the professional standards and guidelines that govern conduct within the industry. Understanding the difference is critical to maintaining compliance, building client trust, and upholding the integrity of the profession.

1 Hour CE



Ron Byrd - SOTX

Course number - 147654

Coverage Gaps In The Real Economy

This course provides insurance professionals with a comprehensive understanding of coverage gaps that exist within major medical health plans and how supplemental insurance products can be strategically used to address those gaps. As healthcare costs continue to rise, clients are increasingly exposed to out-of-pocket expenses such as deductibles, copayments, coinsurance, and non-covered services.

1 Hour CE



Ron Byrd - SOTX

Course number - 147652

VA Benefits & Medicare

This course provides an overview of how veterans' health benefits and Medicare work together. Participants will learn the differences between VA coverage and Medicare, when each applies, and how coordination of benefits impacts access to care. The course will cover eligibility, enrollment considerations, and common scenarios veterans face when choosing coverage options.

1 Hour CE



Federico Guardia PSM Brokerage Understanding the FMO

Course number - 143642

This course offers a clear overview of the relationship between insurance agents and Field Marketing Organizations (FMOs). Participants will learn the role FMOs play in supporting agents through carrier access, training, compliance guidance, and back-office services. The course will also explore how compensation structures work, expectations on both sides, and how to evaluate and select the right

Agenda & Times

8:30 AM - Welcome and Announcement

9:00 AM - 9:50AM - Understanding the FMO Relationship

9:55AM - 10:45AM - Veterans and Medicare

**10:50AM - 11:20AM - Navigating NABIP - How It's Done
Ron Byrd - NABIP-SOTX Board Member**

11:30AM - 12:40PM - Lunch & Exhibitor Visits

12:50PM - 1:40PM - Coverage Gaps in The Real Economy

1:40PM - 2:00PM - Exhibitor Visits

2:00PM - 3:00PM - Explain AI to Clients (Before AI does it for you)

3:00PM - 3:30PM - Exhibitor Visits

3:35 PM - 4:25 PM - Ethics vs Morals, You Decide

4:30PM - Wrap Up and Vendor Drawing

Please be advised that all participants are responsible for their own attendance during scheduled class times. It is essential that you sign in at the start of each class and sign out at the conclusion and that your name, license number and contact information are clear and correct. This ensures accurate tracking of your participation and adherence to class requirements.

Failure to sign in and out may impact your attendance record and overall compliance with course policies. We appreciate your cooperation in maintaining these procedures.



Hosting Location

McAllen Chamber of Commerce
1200 Ash Ave.
McAllen, TX 78501

Parking is located on the west side of the chamber.



Attendee Registration

SOTX Members

\$45

Agency of 5 - \$190 (\$36 PP)

SOTX NON-Members

\$65

Agency of 5 \$290 (\$56 PP)

[Register Here](#)

National Association of Benefits and Insurance Professionals



www.nabipsotx.org

2026 Summit

Mission Possible

**IDEAS IN ACTION,
FUTURES IN FOCUS**

We look forward to seeing you at our
10th South Padre Island - Summit.

Once again, we'll provide CE credits,
Industry leaders and take a deep dive
into what it takes to be successful in
today economy.

Mission Launch Date: 08/27/2026

Mission Return Date: 08/28/2026

Join Us At Our 11th Summit

www.nabipsotx.org