

7th Annual

# Summit 2024

September 5/6, 2024  
South Padre Island, TX  
Marriott Courtyard

## Empowering Tomorrow's Life:

## Where Healthcare, Wealth Management, and Medicare Professionals Unite

**5 HR CE Credit**

 [www.nabipsotx.org](http://www.nabipsotx.org)



# Welcome



## Iris Castillo

NABIP-SOTX President

---

*Iris Castillo*

On behalf of the National Association of Benefits and Insurance Professionals - South Texas Chapter (NABIP-SOTX), it gives me immense pleasure to extend a warm welcome to you all to our 7th Annual Summit! As the President of NABIP-SOTX, I am thrilled to see the enthusiasm and anticipation surrounding this year's event, and I am confident that it will be an enriching and unforgettable experience for each one of you.

Our summit is not just another gathering; it's a platform where industry leaders, professionals, and enthusiasts converge to delve into the latest trends, insights, and innovations in our field. Set against the picturesque backdrop of South Padre Island, this year's summit promises to be an exceptional blend of learning, networking, and exploration.

Moreover, the summit offers a unique chance to connect and engage with top-rated business and insurance carriers. Whether you're seeking strategic partnerships, exploring new business opportunities, or simply looking to exchange ideas with industry peers, you'll find ample opportunities to do so during our networking sessions and social events.

One of the highlights of this year's summit is the exclusive bay exploration aboard a pirate ship. As we set sail on the tranquil waters of South Padre Island Bay, you'll have the chance to unwind, mingle, and forge new connections in a truly unforgettable setting.

As we embark on this journey together, I would like to express my deepest gratitude to our sponsors for their generous support and unwavering commitment to our mission. Your contributions play a pivotal role in making this summit possible, and we are truly grateful for your partnership.

To our esteemed guests, I extend my warmest welcome and heartfelt thanks for joining us on this exciting journey. Your presence enriches our summit, and we are honored to have you with us.

# Conference Schedule



## Sunset Bay Cruise

September 5, 2024

501 E Maxan St,  
Port Isabel, TX 78578

*(westside of the SPI Bridge)*

6:00 - 8:00 PM

Black Dragon Pirate Ship

NABIP-SOTX invites you to join us on this interactive pirate adventure cruise. Lots of entertainment, lots of excitement and lots of pure fun for all. Come aboard and learn to fight like a pirate, speak like a pirate, hunt for treasure like a pirate and share the booty. Afterwards, join us at Bar Louie - oceanside - located in the Marriott Courtyard for some late night Rum.

## The Summit

September 6, 2024

*Subject To Change*



8:30 - 9:30 AM

Registration

9:30 - 10:20 AM

CE Class 1

10:20 - 10:30 AM

Sponsors 1&2

10:30 - 11:20 AM

CE Class 2

11:20 - 11:30 AM

Sponsors 3 & 4

11:30 - 12:00 AM

Exhibitors Visits

12:00 - 12:45 PM

Lunch

12:45 - 1:15 PM

Awards / Treasure Hunt

1:15 - 2:05 PM

CE Class 3

2:10 - 3:00 PM

CE Class 4

3:00 - 3:25 PM

Exhibitors Visits / Ice Cream

3:30 - 4:20 PM

CE Class 5

4:20 - 4:45 PM

Wrap Up / Raffle Drawings

5:30 - 8:00 PM

Taquitos/Happy Hour/Band

9:00 PM

Fireworks - SPI

# Sponsorship Opportunities



## Pieces of Eight \$5,000

Two Tables  
Priority Placement  
4 Attendees  
Website Banner Ad - 1 Year/Link  
5 Minute Speaking Opportunity  
Company Logo / Facebook Page  
1 Year AD in SOTX Monthly  
Newsletter w/ Linkable Logo  
Logo Placement Registraton Table

## Shiver Me Timbers \$4,000

Two Tables  
2nd Priority Placement Location  
3 Attendees  
Website Banner Ad - 6 Months  
4 Minute Speaking Opportunity  
Company Logo / Facebook Page  
6-Month AD in SOTX Monthly  
Newsletter  
Logo Placement Registraton Table

## Yo-Ho-Ho \$3,000

One Table  
Third Priority Placement Location  
2 Attendees  
Website Banner Ad - 3 Months  
3 Minute Speaking Opportunity  
Company Logo / Facebook Page  
3-Month AD in SOTX Monthly  
Newsletter  
Logo Placement Registraton Table

## Thar She Blows \$2,500 Pirate Ship Cruise

1 Exhibit Table at Summit  
2 Attendees  
5 Minute Speaking Opportunity  
Before Setting Sail  
Recognition at the Summit  
Post Cruise Handouts  
Logo On Website section with  
Cruise Pictures

## Land Ho - \$2,500 Post Summit Happy Hour w/ Band/Fireworks

1 Exhibit Table at Summit  
2 Attendees  
Table Top Handouts  
1 Exhibit Table at Post Summit  
Handout drink ticket to attendees  
Logo On Website section with Post  
Summit Mixer

## Aye, Aye - \$2,500 Lunch

1 Exhibit Table at Summit  
2 Attendees  
5 Minute Speaking Opportunity  
Before Lunch  
Lunch Table-Top Banners W/Logo  
for both Breakfast / Lunch Sponsor

## ARRR! - \$2,500 Breakfast

1 Exhibit Table at Summit  
2 Attendees  
5 Minute Speaking Opportunity  
Before Lunch  
Lunch Table-Top Banners W/  
Logo for both Breakfast / Lunch  
Sponsor





## Heav Ho Photo \$1,500

1 Exhibit Table at Summit  
2 Attendees  
Logo on website with Summit photo section

Walk The Plank - \$1,500  
Lanyards or Logo Name Badge

1 Exhibit Table at Summit  
2 Attendees  
Logo on name badges

## Ahoy Matey - \$1,500 Registration Bags

1 Exhibit Table at Summit  
2 Attendees  
Provide your company-branded bags to be distributed at registration.

## Thar Be Treasure \$1,250 - Ice Cream

1 Exhibit Table at Summit  
2 Attendees  
Ice Cream Cart parked at your booth for you to distribute Ice Cream during break.

## Jolly Roger \$1,250 Pen/Notepads

1 Exhibit Table at Summit  
2 Attendees  
Supply each table with your company notepads and pens for Summit

## Scallywag \$850 Exhibitor

1 Exhibit Table at Summit  
2 Attendees  
Booths will be assigned

## Blimey \$500 Treasure Map

Company logo on treasure map to be distribute to each attendee for the treasure hunt.

## Buccaneer \$500 Bingo Cards

Logo on each bingo card for attendees to get stamped during vendor exhibits. Cards will be distributed at your booth.

*(This is an add-on to any purchased sponsorship package listed in this brochure - only 1 available)*

## Crows Nest \$500 Audio Sponsor

Company Logo on audio/sound table and mention from stage throughout the day as the sponsor



# Certification Classes

*Subject to changes*

Friday | 06 sept | 2024

5 Hours CE Credit

## Tony Merwin Understanding the Future of Medicare

Course # 135331 - 1 HR CE



## Victoria Trevino Medicare and CMS, Don't Get Sidelined by Regulations Roadblocks

Course # 134890 - 1HR CE



## Kyle Estep ICHRA: Is It A Good Fit For My Clients?

Course # 123291 - 1HR CE





**Hector Gracia**  
**Ethics - Tricks or Treats**  
**Spanish**

**Course # - 119826 - 2 HR CE**

This class will be taught in Spanish.



**Neil McNeil**  
**Ethics - Tricks or Treats**  
**English**

**Course # - 119826 - 2 HR CE**

This class will be taught in English

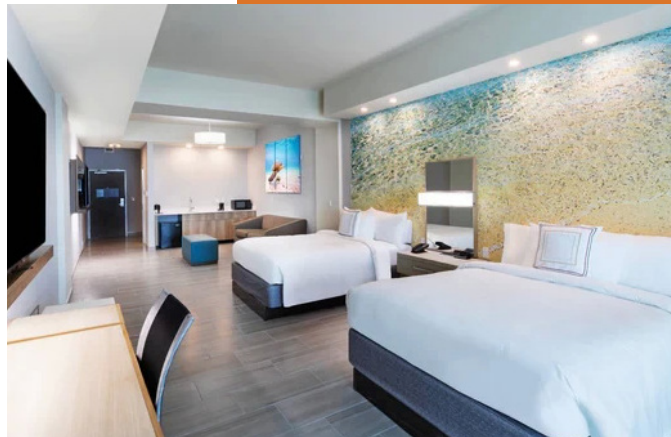


# Hotel

## Courtyard Marriott

6700 Padre Blvd.  
South Padre Island, TX 78597  
956-433-0590

**STANDARD ROOM**  
**\$160**



**SUITE ROOM**  
**\$180**

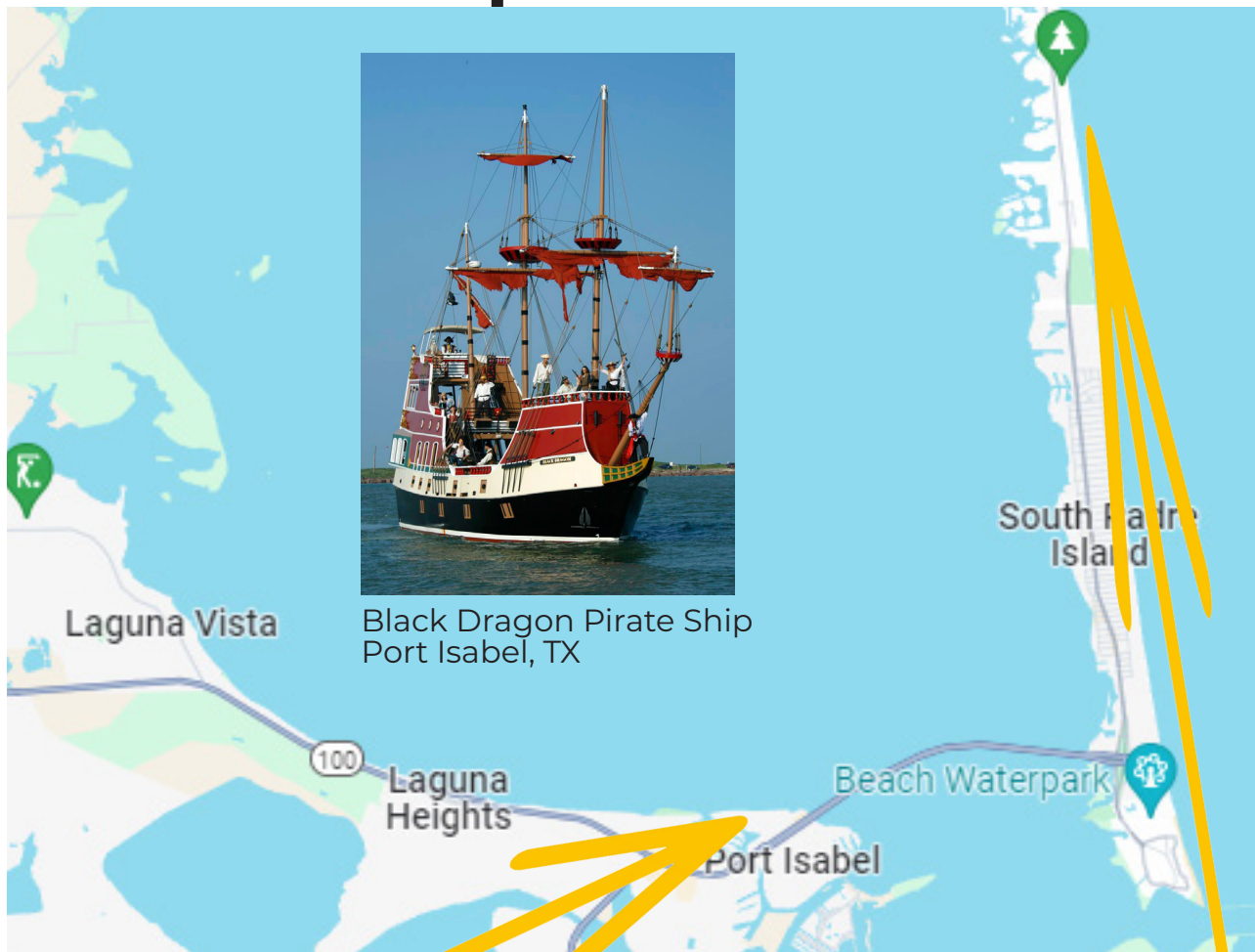


**SLEEPING ON THE  
BEACH - FREE!**





# On The Map



1

Black Dragon Pirate Ship - 501 E Maxan Street - Port Isabel, TX 78578

Marriott Courtyard - 6700 Padre Blvd. South Padre Island, TX 78597  
956-433-0590

2



NABIP-SOTX MEDICARE & EMPLOYEE BENEFIT SUMMIT - **SEPTEMBER 5/6, 2024**

**Sponsor Registration Form**

Company name: \_\_\_\_\_

Product/Service: \_\_\_\_\_

Contact name: \_\_\_\_\_ Title \_\_\_\_\_

Phone: Office (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Email: \_\_\_\_\_

Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Onsite Coordinator name: \_\_\_\_\_ Title \_\_\_\_\_

Phone: Office (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Cell (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Email: \_\_\_\_\_

Summit Sponsorship Category - \_\_\_\_\_ Cost: \$ \_\_\_\_\_

The Sunset Bay Cruise is included with your Sponsorship for you and one additional guest. # \_\_\_\_\_ will be attending with me.

Comments: \_\_\_\_\_

Additional attendee registrations \_\_\_\_\_ x **\$50 each** = \$ \_\_\_\_\_ Total: \$ \_\_\_\_\_

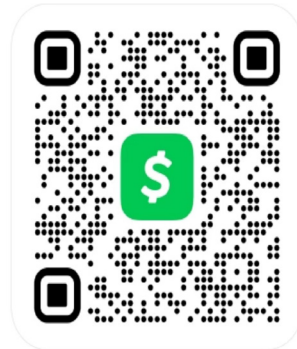
Paying by Check

Paying by Cash App

Make checks payable to NABIP-SOTX.  
**National Association of Benefits  
and Insurance Professionals**  
PO BOX 4140 - McAllen, TX 78502  
Contact Information:

email: [nabipsotx@gmail.com](mailto:nabipsotx@gmail.com)

Phone #: 956-352-9550 x 110 Fax: 956-781-8688



Credit card payment.

Charge my credit card \$ \_\_\_\_\_ Please note there is a processing fee of 4% on all credit card transactions.

Cardholder Name: \_\_\_\_\_

\_\_\_\_\_ Credit Card # \_\_\_\_\_ Expiration Date: \_\_\_\_\_ Val.

Code \_\_\_\_\_ Cardholder Address: \_\_\_\_\_ City/State:

\_\_\_\_\_  Zip  Check one:  Visa  MasterCard  American Express

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

[Email this form](#)

[Print this form](#)



956-352-9550 x 110



[www.nabipsotx.org](http://www.nabipsotx.org)



PO Box 4140, McAllen TX 78501