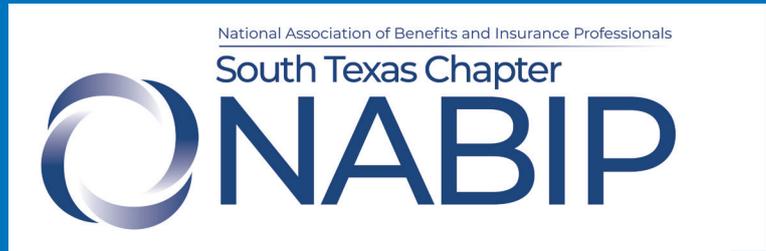


9th Annual

**ATTENDEE  
AGENDA**



— 2025 —

# SUMMIT

## **CHARTING YOUR COURSE FOR SUCCESS**

*August 6-7, 2025 - South Padre Island, Texas*  
NOW A FULL 1-1/2-DAY EVENT

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



# Hello and welcome to our 9th Annual Summit!

Setting the right course for success in your business begins with clear goals, strategic planning, and continuous adaptation. It involves identifying your target market, understanding their needs, and crafting a product or service that meets those needs effectively. Establishing strong financial management practices, building a reliable team, and maintaining a customer-centric approach are crucial components.

Additionally, staying flexible and willing to adjust your strategies based on market trends and feedback ensures long-term sustainability. Success doesn't come overnight; it requires discipline, persistence, and the ability to learn from both successes and setbacks. With the right direction and mindset, your business can grow and thrive in a competitive landscape.



# Dear Valued Summit Attendee,

On behalf of NABIP-SOTX, it is my great honor and pleasure as President to welcome you to our 2025 Annual Summit here on beautiful South Padre Island.

Our Summit brings together the best and brightest in our industry—agents, brokers, benefit professionals, industry experts, and association leaders—for two days of top-tier education, important networking, and insightful conversations.

As President, my aim is to ensure this event not only equips you with cutting-edge strategies and practical tools—especially in areas like Medicare, compliance, agency growth, and technology—but also fosters lasting connections among colleagues who share your dedication to serving Texans.

From a lively bay cruise to meaningful breakout discussions, I hope you leave energized, inspired, and more deeply connected to the NABIP-SOTX family.

Continuing education is central, all while engaging with sponsors and exhibitors, who are eager to share innovative solutions that can elevate your agency or firm.

Whether this is your first NABIP-SOTX Summit or your tenth, know that your presence matters. Our collective efforts ensure that the brokers and agents of Texas are equipped to provide high-quality, ethical, and accessible health insurance solutions to Texans.

Thank you for joining us this August. I am thrilled to meet you in South Padre Island, to learn about your goals and challenges, and explore how we can strengthen our profession together.

Warm regards,

Iris Castillo  
President, NABIP-SOTX 2025



# Registration

Before 8/1/25

**MEMBERS \$50  
NON-MEMBERS \$90**

AFTER 8/1/25

**MEMBERS \$80  
NON-MEMBERS \$120**

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Registration Includes:

**All 8 CE's Classes  
Meals & Drinks During The Summit  
Ice Cream Social  
Sunset Bay Cruise for 1 *(Additional Guest \$20)***

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# Agenda & Times

## **Wednesday - 8/6/25**

Noon - 1PM - Vendor set up

1:00 - Registration Open

1:30 - Opening Remarks / Housekeeping Rules for the day

1:50 - Course 1141835 - The Artificial Intelligence Machine - David Slepak

2:40 - Course 141834 - Self-Funded Fundamentals - Jennifer Henry

3:30 - Vendor Visits

4:00 - Course 136061 - PBM 101: The Perfect Storm - David Antongiovanni

4:50 - Membership Meeting

5:00 - Wrap up and evening instructions

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5:30 - Head to Pirates Landing for Sunset Bay  
Cruise 501 MAXAN ST. PORT ISABEL, TX 78578

8:00 - Pirates Landing after cruise mixer

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## **Thursday - 8/7/25**

REGISTRATION OPEN - 9:00

Housekeeping rules for the day - 9:20

Course 136062 - PBM 201 - How Special is the Specialty Market- 9:30

David Antongiovanni

- Course 143836 The Underlying Cost of Accessing Healthcare

- Joe Brining 10:20

Vendor Visits - 11:10

NABIP Website Discussion - 11:30

Lunch / Vendor Visits - 11:45

Course 141624 - Ethics - The NABIP Way - Part 1 - Rusty Rice - 12:15

Course 141624 - Ethics - The NABIP Way - Part 2 - Rusty Rice - 1:10

Ice Cream Social / Vendor Visits - 2:00

NABIP-TX Legislation Update - 2:20

Choice of two CE's - 2:45

Pick One

Course 141624 - Ethics - The NABIP Way - Part 3 - Rusty Rice

Course 143021 - Level-Funded + GAP = Near-Perfect Health Coverage

Greg Allen

Vendor Drawings - 3:30

AGENDA SUBJECT TO CHANGE

WWW.NABIPSOTX.ORG - LOCAL

WWW.NABIP-TX.ORG - STATE

WWW.NABIP.ORG - NATIONAL



## Hosting Location

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

01. Single Room
02. Suites
03. SHARE A ROOM, OR SLEEP ON THE BEACH FOR FREE!



**Room Rate \$219**

Register here for Attendees:

<https://form.jotform.com/251404860368155>

Contact Information below:

Ron Byrd

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

Phone #: 956-352-9550 x 110



## Conference Registration

Please book for your conference by filling the form below, specify the expected number joining the conference.

Company Name

Full Name \*

First Name

Last Name

E-mail \*

example@example.com

License Number \*

Phone Number \*

Number of people attending \*



# Set Sail for SOTX's 2025 Summit

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