

AGENDA

NABIP-SOTX SUMMIT 2026

AGENDA SUBJECT TO CHANGES

August 27

11:00 - 12:30 Vendor Set

12:00 - Registration Opens

1:00 - Welcome

1:10 Business Meeting

1:15 - NABIP-TX President, Jennifer Pleasants

1:30 CE - Protecting Futures: How Juvenile Life Insurance, 529 Plans, 530A IRA's Create a Complete Financial Strategy for Families

2:30 - Vendor Visist

3:00 CE - ICHRA: A practical Guide for Benefits Professionals

4:00 - Space X Viewing - Hotel Lobby

7:30 - Reception - Bar Louis, Oceanside

Dinner on your own

August 28

8:30 - Breakfast

9:00 CE - Cross-Marketing Health, Life & Ancillary Plans, A Compliance-First Approach

9:50 - United Healthcare Sponsor

9:55 - Breakfast Sponsor - PSM Brokerage

10:00 - Breakfast Sponsor ManhattanLife

10:10 CE - Stop Asking AI Dumb Questions, Start Giving It Assignments

11:00 - Lunch Sponsor Caring & Sharing

11:05 - Lunch Sponsor Ambetter

11:10 - Exhibitor Time

11:40 - Lunch

12:15 - NABIP-TX Awards

12:35 - Lunch Sponsor - Trusted Senior Specialist

12:40 CE - Meroney Public Affairs

Deconstructing the 2026 Primary Election and its impact on healthcare policy and agents: What's Next?

1:30 - CE Brokers Unfiltered: Lessons from Brokers in Cars Getting Coffee

2:20 Ice Cream Break & Exhibitor Visits

2:45 CE - Medicare, Beyond the Policy

3:35 - Warp Up / Door Prize Drawings

WWW.NABIPSOTX.ORG - LOCAL

WWW.NABIP-TX.ORG - STATE

WWW.NABIP.ORG - NATIONAL

OUR SPEAKERS

8/27/26
1:30 PM



Protecting Futures: How Trump Accounts, 529 Plans, and Juvenile Life Insurance Create a Complete Financial Strategy for Families

President
Brokers National
Alliance Agency

Ron Byrd – Course # 148342

8/27/26
3:00 PM



ICHRA's - A Practical
Guide for Benefits
Professionals

Director of Sales
Kyra Health

Carla Adams – Course # 147653

8/28/26
9:10 AM



Compliance Strategies
for Health, Life and
Ancillary Benefits

Executive Account
Manager
PSM Brokerage

Greg Segovia III – Course # 148364

8/28/26
10:00 AM
&
2:25 PM



Course # 148824 & 148835

10:00 AM
Stop Asking AI Dumb
Questions, Start Giving
it Assignments

2:25 PM
Brokers Unfiltered:
lessons from Brokers
in Cars Getting Coffee

Reid Rasmussen – **CEO & Co-Founder, freshbenies**

8/28/26
12:45 PM



Deconstructing the 2026 Pri-
mary Election and its impact
on healthcare policy and
agents: What's Next?

Meroney Public Affairs

Mike Meroney & Shannon Meroney Course #147217

8/28/26
2:45 PM



Medicare, Beyond
The Policy

Owner
Rhythm Insurance
Agency

Cliff Stubbs – Course # 146731