

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

**Launch Pad: Courtyard Marriott  
South Padre Island, Texas**



# WELCOME

## TO OUR 2026 SUMMIT



### Dear Vendors, Sponsors, and Attendees,

On behalf of the National Association of Benefits and Insurance Professionals, South Texas, it is my pleasure to welcome you to our 2026 Annual Summit here on beautiful South Padre Island! We are so excited to have you join us for what promises to be one of our most dynamic and engaging events yet.

This year's Summit will feature 8 hours of continuing education credit, providing valuable learning opportunities designed to keep you informed and ahead in our ever-evolving industry. You'll also have the chance to meet and connect with some of the nation's top carriers and their representatives, who are eager to share insights, updates, and solutions that help drive success for all of us in the benefits and insurance community.

And for a truly out-of-this-world experience — we're changing things up this year! Instead of our traditional SPI Bay Cruise, we'll be taking an exclusive tour of SpaceX, right here at Boca Chica. It's an incredible opportunity to see innovation in action and pick up a CE credit along the way.

Thank you to our vendors, sponsors, and members who make this event possible year after year through your continued support and engagement. Together, we are shaping the future of our profession and building a stronger, more connected South Texas insurance community.

Enjoy the Summit, the networking, and the sunshine — and get ready for an unforgettable experience at the beach and beyond!

**Vicky Vela**  
SOTX President



# Mission Itenary

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*Subject to last minute changes*

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## Star Base Check-in

**08/27**

Courtyard Marriot - South Padre Island \$159  
Mission briefing begins at 1:00 PM sharp!

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## Space X Visit

Cadets board the land movers at 4:00 PM for the 55-minute drive to Space X with a CE class along the way - **Limited to 57 passengers**



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**08/28**

## Mission Control

We will begin our debriefing at 9:00 AM in Meeting Rooms:

- Pelican
- Heron
- Egret

Some Spanish debriefings will be in the:

- Falcon

Lunch will be held in the **Spoonbill & Ibis** rooms

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**08/29**

## Beach Time

For those who want to make a long week-end of the Mission, it's now time to enjoy the beach, ocean and Bar Louis. Have Fun!

# AGENDA

## NABIP-SOTX SUMMIT 2026

AGENDA SUBJECT TO CHANGE

### August 27

11:00 - 12:30 Vendor Set

12:30 - 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 Tour - Hotel Lobby

7:00 - Return to Hotel

Dinner on your own

### August 28

8:30 - Breakfast

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

**10:00 CE - Stop Asking AI Dumb Questions, Start Giving It Assignments**

11:00 Exhibitor Time

11:30 - Lunch

12:15 - NABIP Information

**12:30 CE - Meroney Public Affairs - TX State of the State and Elections 2026**

1:30 Ice Cream Break & Exhibitor Time

**2:15 CE - Medicare, Beyond the Policy**

3:10 - Warp Up / Door Prize Drawings

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WWW.NABIP-TX.ORG - STATE  
WWW.NABIP.ORG - NATIONAL

# Summit Location

## Courtyard Marriott – SPI



**ROOM RATES – \$159**  
**Doubles or Suites**  
**Thursday – Saturday**

- 1-800-MARRIOTT  
(1-800-627-7468) or  
956-433-0590
- Rate Code:  
South Texas Association  
Summitt
- Rate Cutoff Date: 7/28/26

### Nearby Amenities

- Sea Turtle Inc
- Zip Lines
- Horse Back Riding
- Water Park
- And of course... The BEACH



# OUR SPEAKERS



Texas State of the State, Elctions 2026 and the 90th Legislature (2027) as Insurance is expected to be one of the major topics discussed.

Mike Meroney  
Shannon Phillips Meroney




 **Federico Guardia**  
**Greg Segovia**

**Cross-Marketing  
Health, Life, and  
Ancillary Plans**

**A Compliance  
First Approach**



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

 **Ron Byrd**

# OUR SPEAKERS

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Reid Rasmussen

**Stop Asking AI Dumb Questions,  
Start Giving It Assignments**



Carla Adams

**ICHRA's - A Practical Guide for  
Benefits Professionals**



Cliff Stubbs

**Medicare,  
Beyond The Policy**

# Individual or Agency Registration



Use the following link to register you or your agency

<https://pci.jotform.com/form/261373771565161>



## CONTACT INFORMATION

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# THANK YOU

