

## Letter From The President



Dearest Members,

This year I attended the 2017 Cap Conference in Washington D.C. The Cap Conference was as rewarding as it was exhausting. We were able to meet with the Oklahoma Congressional Delegation over two days. In the past, NAHU provided a list of bills that we either supported or opposed. The list was then used as talking points during the meetings with the Congressional Delegation. This year NAHU took a different approach in our talking points. NAHU feels

that the most critical need is to stabilize the individual market. If we cannot stabilize this market it could collapse and cause a domino effect for both the small and large group markets. The following is a list of ideas that are designed to stabilize the markets.

### Individual Market:

- Keep premium tax credits, cost-sharing tax credits to territories until an alternative is available.
- Allow tax credits to be used outside of the marketplace if fewer than two choices are offered in a state.
- Replace the ACA tax credit with an age-rated flat refundable and advanceable credit.
- Allow any person to purchase catastrophic category coverage



Pictured left to right: David Harder, Pat Robertson, Sen. James Lankford (R-OK), Justin Lord and Jennifer Britton.

## SAVE THE DATE

**April 13, 2016 8:00 am**

Six Hour CE Approved- Spring CE Symposium

Cost: \$70 Member/\$120 Non-member

Location: Quail Creek Country Club

**May 4, 2017 3:30 pm**

OKAHU Board Meeting

Location: BHI Insurance Agency- 5532 N. Western Avenue, OKC, 73118

**June 8, 2016 11:30 am - 1:00 pm**

Installation of New Officers

Location: Quail Creek Country Club

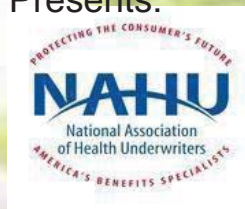
## IN THIS ISSUE

- 2 Spring Symposium Agenda and Sponsors
- 3 New Member Spotlight/Operation Shout
- 4 President's Letter continued/ Professional Development
- 5 Treasurer News
- 6 Board Roster/Member Anniversaries
- 7 Public Service/Legislative Update
- 8 Corporate Sponsors
- 9 Photo Gallery/National Convention News

The Oklahoma City Association of Health Underwriters Presents:



**6 Hours of Continuing Education**  
**April 13, 2017**  
**QUAIL CREEK GOLF & COUNTRY CLUB**



## AGENDA

- 7:00** Sponsor Set-up Begins  
**7:45 - 8:30** Registration/Breakfast  
**8:30 - 9:20** Melody Anthony, OHCA  
**9:20 - 10:10** Joni Post, Dph, Director of Pharmacy, BCBS
- 10:10 - 10:30** BREAK with Sponsors
- 10:30 - 11:20** Dan Meylan, Allied National, Self Funding Presentation  
**11:20 - 12:10** Rick Farmer, Business Ethics 101  
**12:10 - 12:30** Kelly Fristoe, Region 6 NAHU VP
- 12:30 - 1:30** Lunch Buffet / Sponsor Time
- 1:30 - 2:20** Rick Farmer, When Ethics Fails: Combating Fraud
- 2:20 - 3:10** BREAK with Sponsors
- 3:10 - 4:00** Joe Brining, Combined Insurance, Hidden Costs of Healthcare  
**4:00 - 4:20** Exhibitor Drawings

## Thanks to our Sponsors!



BlueCross BlueShield  
of Oklahoma

Careington  
SOLUTIONS SIMPLIFIED

Dearborn national

DELTA DENTAL



RESERVE NATIONAL

Ohio National  
Financial Services



## Member Spotlight—New Members

Please welcome our newest members to OKAHU!!!

**Donna Meek**  
Staff One  
donna.meek@staffone.com  
(405) 562-6692

**Susanne James**  
Employee Benefit Professionals  
sjames@ebpokc.com  
(405) 286-9696

**Sheila Morford**  
3000 Insurance Group  
sheila@3000ig.com  
(405) 751-8356

**Jason Willeford**  
Dillingham Insurance  
jason@dillinghaminsurance.com  
(405) 236-1991

**Dana Nursick**  
Benchmark Financial Group, Inc  
dana@benchmarkfinancial.com  
(405) 840-0028

**Patricia Rees**  
BlueCross BlueShield of Oklahoma  
patricia\_rees@hcsc.net  
(405) 316-7048

**Mariam Robinette**  
BlueCross BlueShield of Oklahoma  
mamie\_robinette@bcbsok.com  
(405) 316-7051

## Operation Shout

Take Action Today!

National Association of Health Underwriters (NAHU) is the leading professional association for health insurance agents, brokers, general agents and consultants. One of the primary ways we engage in advocacy for the consumer is by supporting legislation that ensures the future and stability of the insurance industry. Through Operation SHOUT, you as a member have the opportunity to participate in this exciting process.

Go to <http://cqrceengage.com/nahu/home>.

From there go to the Federal Action Center to learn more about NAHU's priority legislative issues and bills.

If you Take Action - print out your Thank You Confirmation. Bring that page with you to our monthly luncheon/meeting and your name will be put in the hopper for a free lunch or mug. Remember, we are most effective when we speak with one voice. We encourage you to use the information and resources on NAHU.org.

March 2017 Winner: Sherri Pryor

February 2017 Winner: Lisa Fontenberry

## Join a Committee

It's never too late to join a OKAHU committee. It's a great way to meet other professional in your industry and educate yourself along the way.

President's Letter, continued from page 1

regardless of age or income status.

- Tighten both open enrollment and special enrollment periods to reduce adverse selection
- Reduce the number of special enrollment opportunities
- Adjust open enrollment rules.
- Allow states to be eligible for funding for new hybrid high-risk pools.

#### Employer-Based Market:

- Allow the small business tax credit to continue for two years.
- Increase flexibility for HSAs.
- Preserve the employer exclusion.

#### Tax and other repeals:

- Repeal the Health Insurance Tax
- Repeal the Excise/Cadillac Tax
- Repeal the medical loss ratio requirement.

Representative Mark Wayne Mullen on the Energy and Commerce Committee was probably the most informed on the process. The meeting made it evident that the House is going forward with plans to put forward a reconciliation bill that would repeal budgetary aspects of ACA. We can also report the plan described to us includes a multitude of replacement bills added to other legislative items. We were told to expect a series of smaller fixes attached to other bills rather than one large replacement effort.

The report from the Senate tend to confirm what we heard from the House side with most of the major working starting from the House committees. We were told to look for formal bills to drop in March or April.

Pat Robertson

2016-2017 OKAHU President

## Professional Development

Finding good subject matter to bring to our membership throughout each year becomes more and more difficult. Good speakers are beginning to charge for their services which are okay if it is a couple of hundred dollars, but not so good at a couple of thousand dollars. Submitting to the Oklahoma Department of Insurance also has its challenges with approval lead times, content approval, making sure it is long enough, ensuring there is no advertising, and authenticating its educational and viable. For this reason, I'm asking each of you to share ideas with this committee. Maybe you know someone who knows someone. We have so many different types of association members that serve our industry in many various ways. Please help us to bring what it is you want to learn more about! With that being said, I think we have a pretty good lineup finishing out the year.

April - 6 hours of CE- Spring Symposium

May - TBD

June - Installation of Officers, no CE

We want to hear from you!

Please contact Carrie Cox at [Carrie.Cox@nfp.com](mailto:Carrie.Cox@nfp.com) or Diane Barton Lewis at [Diane\\_barton@ajg.com](mailto:Diane_barton@ajg.com) with any ideas you might have for continuing education.

Thank you,

Carrie Cox, Professional Development Chair

### GOOD NEWS!

You can now PAY FOR YOUR MONTHLY LUNCHEON by clicking on the following Link:

<https://squareup.com/store/oklahoma-city-association-of-health-underwriters-inc>

Visa, Mastercard, or a Check are acceptable forms of payment. Simply select the above link, ENTER: Date of Event for the Invoice/Reference #, and enter your credit card information.

### 2016 Lunch Prices

Members \$25, Non-members \$50

## Reminders!

### Monthly General Meetings

Our monthly membership meetings are held on the **second Thursday of each month at 11:30 am.**

Quail Creek Country Club (QCCC) is our host for our monthly meetings and CE Seminars. Bring a colleague with you to our next meeting-all are welcome.

QCCC address is 3501 Quail Creek Road, OKC, 73120.



Members, please remember that the Annual Budget, Monthly Treasurer's Report and Board Meeting Minutes are available for your review. Email requests to Carrie Cox at [carrie.cox@nfp.com](mailto:carrie.cox@nfp.com) if you would like further information.

### Purchase your OKAHU travel mugs!



Keep your beverages hot or cold in style by letting the world know you're a proud member of OKAHU! You can purchase mugs for \$10 each at the membership meetings!

### Treasurer News

It's been a fantastic couple of years in the position of OKAHU Treasurer. I greatly appreciate our membership's patience as we have tried out several new tools to help make the member experience better and more cost efficient for our association. The newest update has to do with the member and non-member's ability to pay for meetings via a secure website. We have tested this extensively and have now begun releasing this to our members. Many of you have signed up by this method; we appreciate this. In addition to being convenient, it saves time at the check in lines for any event that we offer. We hope to get better than 1/2 of the membership paying in this manner over the next 6-12 months. In case you haven't tried it, the website to make payments for meetings/CE seminars is located: [here](#).

Of course, if you ever have any challenges or questions about this or any other process and procedure, please feel free to reach out to me by emailing [andy@bhjins.com](mailto:andy@bhjins.com).

Thanks, and we look forward to putting more innovations in like this over the coming months!

Respectfully,  
Andy Bigbie  
2016-17 Treasurer  
[andy@bhjins.com](mailto:andy@bhjins.com)



"And now for the treasurer's report."

## BOARD ROSTER 2016-2017

### **Pat Robertson, President**

Vacant, President Elect

Leah-Anne Janway, Past President/Legislative Chair

Devin Kampert, Vice President

Carrie Cox, Secretary/Education/Program Chair

Andy Bigbie, Treasurer

Kemp Cole, Corporate Sponsors

Diane Barton-Lewis, Director

Jimmy Johns, HUPAC Chair

Jeff Walraven, Awards

Ann Borah, Membership/Retention

Connie Morgan, Director

Laurie Crow, Public Service

Deborah Buck, Communications Chair

Jana Pitt, Hospitality Chair

Jeanean South, Media Relations Chair

Tom Tacheny, Website Chair



Business Address  
PO Box 12146  
Oklahoma City, OK 73157

OKAHU is a non-profit organization dedicated to serving the public by promoting activities and ethical conduct of members through communication, continuing education and increasing industry knowledge. OKAHU members also work to monitor and influence and activities of the state and federal legislatures. We work hard to protect the health care consumer's future.

## Member Anniversaries

We would like to honor our long term association members as often as we can, so we've done a little research and next time you see one of the members listed below, be sure to thank them for being part of our association for so many years. In the next newsletter we'll look at the next generation that has joined OKAHU.

### Joined NAHU

### Association Member

**2005**

Gregory Buwick  
Lisa Fortenberry  
Mary Steichen  
Linda Voss

**2006**

Michael Brown  
Shelby Faust  
Tyler LaReau  
LaNell Osmond  
Joseph Palmer

**2007**

Nova Hammersley  
Betty Ostendorf  
Patrick Robertson

## Refer a Friend!

The National Association of Health Underwriters (NAHU) represents more than 100,000 licensed health insurance agents, brokers, consultants and benefit professionals through more than 200 chapters across America. NAHU members service the health insurance needs of large and small employers as well as people seeking individual health insurance coverage.

Bring a colleague to one of our luncheon/CE meetings and let them see all the advantages of membership, both in being a member of NAHU and in OKAHU.

As part of a NAHU membership you'll receive:

- Legislative Advocacy
- Professional Development, including Local Meetings and CE
- Networking
- HIU Magazine
- Compliance Resources
- Member-only Discounts

## Public Service



**Play Korral the ACE at our monthly luncheon and take a chance on creating a win/win for you and the OK Kids Korral!**

### Here's what's been going on:

- On January 11th, there were 20 tickets sold. Our TAHU guest Lee Berdon pulled the Queen of Spades. The pot is now up to \$274.

**Our winnable pot is now \$274  
Cross your fingers for an April WINNER....**



### The Ways You Benefit From Giving Back

At the Korral, we have many opportunities for you to give back. Whether you can spare a monetary donation; have a special skill to share; or just have time to help with everyday tasks, you are needed. We know everyone lives busy lives, but even just a little time or resources can make a tremendous difference in the lives of children with cancer. If you have ever thought about giving back, think of these benefits to help push you to help those in need.

- Gain More Confidence
- Volunteering is Fun
- Make New Friends

Send your donated items to: The Toby Keith Foundation 818 N.E. 8th Street, Oklahoma City, OK 73104

### Upcoming events:

June 2-3, 2017: Toby Keith & Friends Golf Classic

September 22-25, 2017: "The Dish" College-Am and Schooner Fall Classic (visit [www.schoonerfallclassic.com](http://www.schoonerfallclassic.com) for detailed information)

## Legislative Update

The OKC Legislative Committee's goal is to provide the expertise necessary to give sound legislative advice to the OKC Board of Directors as well as serve a source for OKC Members to address requests for legislative matters or concerns.

We provide monthly Membership meeting verbal reports when we all meet at Quail Creek Golf & Country club the 2nd Thursday of the month.

We have a State P.A.C. for members wanting to contribute at the local level. If you need a current contribution form, please email [yaylaj@cox.net](mailto:yaylaj@cox.net) and we'll get one right to you! Right before this legislative session began, we delivered PAC checks to House Majority Floor Leader Representative Jon Echols, President Pro Tempore Senator Mike Schulz, and Speaker of the House Representative Charles McCall.

Our March 9 Membership Meeting was the annual Legislative Update. If you wish that you had been able to attend, you might mark your calendars for next March; we try to have our annual legislative meeting for our members in March each year. I think those who attended were very glad that they could!

The ACA is still here! Our Insurance Commissioner is warning state and federal lawmakers that Oklahoma is in danger of having no insurers participate in the federal marketplace in 2018! Stay tuned!

LeahAnne Janway

2016-2017 Legislative Chair  
[yaylaj@cox.net](mailto:yaylaj@cox.net)



## Corporate Sponsors 2016-2017



Laurie Crow  
Laurie.crow@ampublic.com  
Phone: 405-416-8888



BlueCross BlueShield  
of Oklahoma

Julie Rethmeyer  
Jrethmeyer@bcbsok.com  
Phone: 918-551-3366



Jennifer Helms  
jhelms@deltadentalok.org  
Phone: 405-607-4793



Greg Holley  
greg@flexplanadmin.com  
Phone: 918-524-6321



Tom Bartlett  
Tom.Bartlett@healthsmart.com  
Phone: 405-607-2629



Kemp Cole  
kjcole@kemper.com  
Phone: 405-848-7931



Russ Angell  
rangell@leaderslife.com  
Phone: 918-254-0200



Dennis Grubbs  
dgrubbs@clrates.com  
Phone: 405-290-5674



Gentrie Pool  
Gentrie.pool@sterlingadministration.com  
Phone: 817-454-9304



Connie Morgan  
connie@suewilsonbrokerage.com  
Phone: 405-843-8300



Blake Henley  
blakehenley@sunlife.com  
Phone: 214-326-4590



Zack Taber  
zack@taberbrokerage.com  
Phone: 405-235-4610



www.tasconline.com



Steve Lanier  
Steve\_lanier@uhc.com  
405-415-81480



Pat Robertson  
pat@wrcins.com  
Phone: 800-523-3879

## Photo Gallery

March 9, 2017 Membership Meeting



National Association of Health Underwriters Annual Convention and Exhibition (NAHU Convention) is a high-value meeting offering knowledgeable speakers, a professional development day, highlight events, and exhibit hall. This 4 days convention and exhibition is being organized by National Association Of Health Underwriters (NAHU). The venue of this event is Renaissance Orlando Hotel at SeaWorld which is situated in Orlando, Florida, United States of America.

NAHU Convention 2017 will showcase a wide range of products and services and over 60 exhibitors are expected at this event to showcase their products and services. Over 700 visitors are expected at this convention and exhibition. Visitor profile of this event includes health insurance agents, brokers, consultants and benefit professionals.

The deadline for the early bird rate is April 26th so don't delay, reserve your space and be part of the "Future".

Click [HERE](#) for an online agenda.  
click [HERE](#) to register online.