

# OKAHU IN THE NEWS

## Letter From The President



Happy SPRING Dear Members!

What a year for our chapter, our clients and our industry! We are proud that we have continued to keep the best interests of our MEMBERS as our priority. We are very fortunate to have a strong, working board and under the upcoming leadership of Pat Robertson, we will be able to continue to focus on Education, Advocacy & Professional Development.

Here's a review of our chapter's activity. Feel free to share and brag about your chapter to others, I know I do as often as I can!

We provided Continuing Education courses on Health Savings Accounts, The Millennials, Employer Reporting, Legislative, Medicare, Ethics, GAP Insurance, the D.O.L. course at the symposium and our National President brought us a C.E. course when he came in November. This month's MAY meeting is 1 hour Long Term Care C.E.

We strive to keep you all updated on Legislative activities and appreciate your understanding if extra emails have to go out. The BEST reason to attend our monthly membership meetings is the verbal Legislative Report with time for Q & A which Connie has perfected to an art!

We moved our March membership meeting to our Day At The Capitol event which also provided 1 hour of Legislative C.E. all at no cost to our members.

We attended the Region VI Conference in Grapevine, TX, Capitol Conference in Washington D.C. and will be sending delegates to the National Convention in Albuquerque this JUNE.

We earned the Gold Chapter Certification award and have filed for 3 other awards that will be presented at the National Convention.

We initiated Korral The Ace of Spades card game as a fun way to raise funds for our Charity OK KIDS KORRAL.

We brought back Operation Shot DRAWING at our general membership meetings.

We LOVE our Corporate Sponsors for their products, education and financial support. We appreciate our members when they support these companies who support us.

We are planning another SOCIAL! Stay tuned for details but I know you Do Not Want To Miss this fun event. This is the absolute best time to socialize and just unwind—you deserve it!

We are working on a SEASON PASS for the July 1 term allowing members to pay for a year's worth of luncheons at a discount.

Other than winding down my term serving you, we have a revised set of By Laws up at National's for review & approval and we have 13 Policy & Procedures being reviewed. The JUNE meeting is the Annual meeting where we install the new Board, announce our Person of the Year plus the STATE Association will be joining us for their installation of officers along with presentation of any awards or scholarships.

Spring is looking awesome from this lap top for sure and I hope that you are smiling too,

Leah-Anne Janway  
OKAHU President 2015-2016

### SAVE THE DATE

**May 5, 2016 3:30pm**  
OKAHU Board Meeting  
BHJ Insurance Agency

**May 12, 2016 11:30am**  
Quail Creek Country Club  
Speaker, Leah Rich, of Word and Brown  
Long Term Care  
1 Hour CE Approved

**June 2, 2016 3:30pm**  
OKAHU Board Meeting  
BHJ Insurance Agency

**June 9, 2016 11:30am**  
Quail Creek Country Club  
Installation of OKAHU & OSAHU Officers  
OKAHU & OSAHU Insurance Person of the Year Award  
No CE

**June 14, 2016, times TBD**  
Membership Social & 1 Hour CE  
Quail Creek Country Club

**June 26-29, 2016**  
NAHU Convention  
Albuquerque, NM

### Inside this issue:

Legislative Update	2
New Members / Professional Development / New Corporate Sponsors / Operation Shout	3
HUPAC Contributions	4
Mugs / Meeting Place and Rates / Pay online	5
NAHU Convention Details	6
Proposed Officers 2016-2017 / Member Recognition	7
Public Service	8
Corporate Sponsors	9
Photo Gallery	10



## Legislative Update

### Oklahoma Report

**Oklahoma Dept. of Insurance Meeting:** In March, Connie Morgan, OKAHU Legislative Chairman, Leah-Anne Janway, Justin Lord, Jennifer Brittain, Jean Miller and Brett Robinson, our Lobbyist, met with the Oklahoma Insurance Department staff about a number of service opportunities we feel are necessary to protect the consumer and agents.

- **Carriers lowering or eliminating commissions on Individual Medical policies on and off the Federal Marketplace.**
  - ◇ OID reports that the Oklahoma Insurance Code is silent on the matter of carriers being required to pay first year commissions on individual medical new business.
  - ◇ Payment of commissions as a private arrangement between the carrier and the producer. Statute does support the arrangement that remains in place regarding payment of renewal commissions in this market segment.
- **Consulting Agreement**
  - ◇ Connie Morgan requested OID to update the existing Consulting Agreement and provide educational guidance to Agents about how to use it.
  - ◇ OID asked for questions from our members so they could create an FAQ.
  - ◇ Julie Meaders, Deputy General Counsel at OID, discuss the Consulting Agreement, Oklahoma Statute regarding it and answered some of the questions posed by our members.
  - ◇ We will provide written follow up from OID to our Membership shortly.
- **Small Group Reform Definition**
  - ◇ We proposed to OID to consider changing the small group reform definition from 2-50 to 1-49.

- ◇ Due to PACE Act, OID confirmed ACA definition of ALE's is 51+. It will remain at 50.
- ◇ OID is working on the definition of 1 versus 2 as the minimum, and we await written guidance.

- **HR2961, Autism Bill**

- ◇ Passed House and passed the Senate with an amendment capping rate increases to 1%, and if this was exceeded carriers to remove the mandate with proof to OID.
- ◇ It is expected to pass this year, it has a lot of support.

- **OKAHU and OSAHU Legislative Committee's** continues to work on other industry related bills. You will be updated as bills progress. The session ends late May.

### Federal Report

- **NAHU Capital Conference Report**

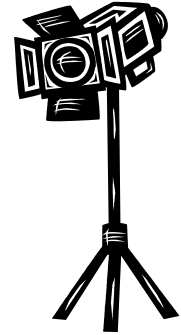
- ◇ Connie Morgan and Wayne Pettigrew attended. We confirmed our Oklahoma Delegation is very supportive of NAHU's Legislative Agenda and will do whatever they can to aid our industry. They are shocked with the massive amount of ACA Employer Compliance requirements and want to help find a fix, plus help with MLR and other issues.
- ◇ Rep. Mark Wayne-Mullen volunteered to author the bill that would fix the COBRA problem for folks on Medicare. NAHU is working on getting this bill written with his help.

Respectfully Submitted,

Connie Morgan  
OKAHU Legislative Chairman

## Member Spotlight—New Members

Please welcome our newest members to OKAHU!!!



**William Allison**  
American Trustee, Inc.  
William.allison@americantrusteeinc.com  
405-482-7233

**Gina Goodgion**  
Employee Benefit Professionals  
ggoodgion@ebpokc.com  
405-286-9696

**Nancee Roberson-Caldwell**  
American Fidelity  
Nancee.roberson@americanfidelity.com  
405-640-7476

**Mandi Plummer**  
Delta Dental of Oklahoma  
mplummer@deltadentalok.org  
405-241-0692

**Richard DeFalco**  
Aflac  
Ricky.defalco@gmail.com  
405-200-5361

**Nancy Purkeypile**  
TASC  
Nancy.purkeypile@tasconline.com  
405-315-9055

### Professional Development

OKAHU recently conducted a survey of its members. Some of the comments dealt with the value of being a member and with the need of more advanced information. The most obvious benefit for the Oklahoma City Chapter is the monthly meetings and the CE provided. Among the many other benefits is an often over looked resource which is the OKAHU and NAHU websites. If you are like me, I have a tendency to focus on the local aspects of NAHU. If you have not been on the NAHU website at [www.nahu.org](http://www.nahu.org), you are missing out on some great resources. I would recommend that you spend some time in the Professional Development dropdown tab (As this is the Professional Development section of the newsletter). There you can earn professional certifications, obtain additional CE's, designations, and the Online Learning Institute. While there is a cost to many they are all at a discounted price for being a NAHU member. There you can focus on what is of greatest importance and value to you.

As always we want to provide quality and timely CE's for the monthly meetings. If you have any suggestions or know of a great speaker please let the Professional Development Committee know.

Pat Robertson, Professional Development Chair,  
800-523-3879

### Welcome to our NEW Corporate Sponsor!!!



**OPERATION SHOUT!!**  
Bring your **OPERATION SHOUT** Thank You for Taking Action email to the lunch and your name will be put into the hopper for a free lunch or mug!

**HUPAC - MAKE YOUR DONATION FOR 2016 NOW!****LEVELS OF CONTRIBUTION****365 Club****Payment Amount**

- Monthly Credit Card or Bank Draft Amount: \$30.00/month
- Annual or One-Time Contribution Amount: \$365.00

**Benefits**

- HUPAC State of the HUnion Newsletter
- Recognition in HIU Magazine
- 365 Club Pin (Black, Distributed Annually)
- 365 Club Badge Ribbon (Distributed at NAHU's Annual Capitol Conference and Annual Convention)
- This contribution level meets NAHU's Triple Crown Award criteria

**Congressional****Payment Amount**

- Monthly Credit Card or Bank Draft Amount: \$42.00/month
- Annual or One-Time Contribution Amount: \$500.00

**Benefits**

- HUPAC State of the HUnion Newsletter
- Recognition in HIU Magazine
- Congressional Club Pin (Blue, Distributed Annually)
- Congressional Club Badge Ribbon (Distributed at NAHU's Annual Capitol Conference and Annual Convention)
- This contribution level meets NAHU's Triple Crown Award criteria

**Senatorial****Payment Amount**

- Monthly Credit Card or Bank Draft Amount: \$63.00/month
- Annual or One-Time Contribution Amount: \$750.00

**Benefits**

- HUPAC State of the HUnion Newsletter
- Recognition in HIU Magazine
- Senatorial Club Pin (Distributed Annually)
- Senatorial Club Badge Ribbon (Distributed at NAHU's Annual Capitol Conference and Annual Convention)
- This contribution level meets NAHU's Triple Crown Award criteria

**CAPITOL CLUB****Gold****Payment Amount**

- Monthly Credit Card or Bank Draft Amount: \$85.00/month
- Annual or One-Time Contribution Amount: \$1,000.00

**Benefits**

- HUPAC State of the HUnion Newsletter
- Recognition in HIU Magazine
- Recognition on HUPAC.org
- Discount on National and/or Regional HUPAC event tickets
- Capitol Club Pin (Gold, Distributed Annually)
- This contribution level meets NAHU's Triple Crown Award criteria
- Capitol Club Luncheon at Capitol Conference

**Diamond****Payment Amount**

- Monthly Credit Card or Bank Draft Amount: \$170.00/month
- Annual or One-Time Contribution Amount: \$2,000.00

**Benefits**

- HUPAC State of the HUnion Newsletter
- Recognition in HIU Magazine
- Recognition on HUPAC.org
- Discount on National and/or Regional HUPAC event tickets
- Capitol Club Pin (Gold with Single Diamond, Distributed Annually)
- Capitol Club Badge Ribbon (Distributed at NAHU's Annual Capitol Conference and Annual Convention)
- This contribution level meets NAHU's Triple Crown Award criteria
- Capitol Club Luncheon at Capitol Conference

**Double Diamond****Payment Amount**

- Monthly Credit Card or Bank Draft Amount: \$250.00/month
- Annual or One-Time Contribution Amount: \$3,000.00

**Benefits**

- HUPAC State of the HUnion Newsletter
- Recognition in HIU Magazine
- Recognition on HUPAC.org
- Discount on National and/or Regional HUPAC event tickets
- Capitol Club Pin (Gold with Two Diamonds, Distributed Annually)
- Capitol Club Badge Ribbon (Distributed at NAHU's Annual Capitol Conference and Annual Convention)
- This contribution level meets NAHU's Triple Crown Award criteria
- Capitol Club Luncheon at Capitol Conference

**Triple Diamond****Payment Amount**

- Monthly Credit Card or Bank Draft Amount: \$415.00/month
- Annual or One-Time Contribution Amount: \$5,000.00

**Benefits**

- HUPAC State of the Union Newsletter
- Recognition in HIU Magazine
- Photo Recognition on HUPAC.org
- HUPAC Award at National Convention
- Discount on National and/or Regional HUPAC event tickets
- Capitol Club Pin (Gold with Three Diamonds, Distributed Annually)
- Capitol Club Badge Ribbon (Distributed at NAHU's Annual Capitol Conference and Annual Convention)
- This contribution level meets NAHU's Triple Crown Award criteria
- Capitol Club Luncheon at Capitol Conference

**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!

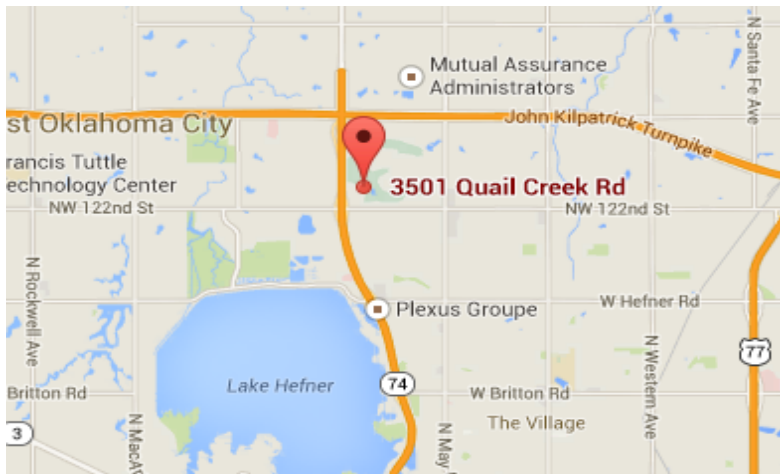


**ALERT!!!!**

**Monthly General Meeting Place!!!**

Our Monthly Membership Meetings are held on the second  
**Thursday of each month.**

**Quail Creek Country Club** is our host for our monthly meetings and CE Seminars. Please join us at 3501 Quail Creek Road, OKC, OK 73120.



2015 LUNCH PRICES  
MEMBERS \$25  
NON-MEMBERS \$50

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.

**GOOD NEWS!**

You can now **PAY FOR YOUR MONTHLY LUNCHEON** by clicking on the following Link: <https://ipn.intuit.com/pay/OKAHU>. 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. Reminder: the price for a **REGULAR MONTHLY LUNCHEON is \$26 for OKAHU Members and Non-Member price is \$52.**



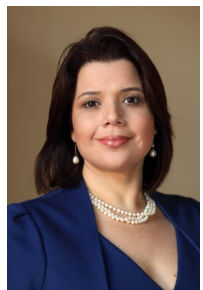
Join us June 26-29 in Albuquerque, New Mexico, to get the tools and information you need to grow and manage your business in these changing times. You will not want to miss this [high-value meeting](#) with knowledgeable speakers, a professional development day, highlight events, our exhibit hall and beautiful Albuquerque weather. Go to [www.nahu.org](http://www.nahu.org) for the preliminary agent and to register for the early-bird registration which ends May 4!



**Sunday General Session Keynote Speaker Donna Brazile**

Veteran Democratic political strategist Donna Brazile is an adjunct professor, author, syndicated columnist, television political commentator, vice chair of voter registration and participation at the Democratic National Committee, and former interim national chair of the DNC, as well as the former chair of the DNC's Voting Rights Institute. She is also the author of the best-selling memoir *Cooking with Grease: Stirring the Pots in American Politics* and an on-air contributor to CNN and ABC, where she regularly appears on *This Week*.

In her presentation, she will address our current political environment, hot-topic legislation, campaigns and voting.



**Sunday General Session Keynote Speaker Ana Navarro**

Ana Navarro is a well-known Republican strategist and a political analyst for CNN and CNN en Espanol. She is also a political contributor on ABC's *The View*. *The Miami New Times* names her a "Republican power-consultant," and the *Tampa Bay Times* called her "a sought-after voice in Republican politics and an adviser for any presidential hopeful," saying, "with confidants Jeb Bush and Marco Rubio she is poised to play a big role in the GOP response to immigration reform and Hispanic outreach."

In her presentation she will discuss the latest hot-button issues in politics, giving the audience an insider's view of the upcoming elections and a roadmap for where the country is headed.



**Professional Development Day**

On Monday, we are presenting our [professional development program](#) designed specifically for benefits professionals. You will be able to choose from 14 sessions featuring industry leading experts speaking on topics such as business transformation, technology, competitive selling and compliance. Of the 14 sessions, one session will be the NAHU [Benefits Account Manager Certification](#) course.

Don't forget, ConventionPLUS registration allows you to re-experience the NAHU 2016 Annual Convention sessions as they happened in Albuquerque wherever and whenever you want.

**Exhibit Hall**

In the exhibit hall, attendees will have a variety of products and services to explore from wellness to technology. Attendees will have many opportunities to visit with sponsors/exhibitors during the president's reception, a reception-style lunch in the exhibit hall and other scheduled openings.



**Hotel Accommodations**

Most Annual Convention functions will be held at the Albuquerque Convention Center. We have negotiated rates with three nearby hotels:

**Doubletree Hotel** is the closest hotel to the Convention Center and is connected by underground parking.

**Hyatt Regency Albuquerque** is across the street from the Convention Center.

**Hotel Andaluz** is a charming boutique hotel, just a 3-minute walk to the Convention Center.

# OKAHU IN THE NEWS

We're on the WEB at [www.OKAHU.org](http://www.OKAHU.org)

## BOARD ROSTER 2015-2016

**Leah-Anne Janway**, President  
**Pat Robertson**, President Elect/  
 Education/Programs  
**Tom Tacheny**, Past President/  
 Membership/Retention  
**Devin Kampert**, Vice President  
**Carrie Cox**, Secretary/Communications Chair  
**Andy Bigbie**, Treasurer  
**Jeff Walraven**, Awards Chair  
**Kemp Cole**, Corporate Sponsors  
**Jana Pitt**, Hospitality  
**Wayne Pettigrew**, HUPAC Chair  
**Connie Morgan**, Legislative Chair  
**Tom Bartlett**, Media Relations Chair  
**Laurie Crow**, Public Service  
**Jimmy Johns**, Director  
**Diane Barton-Lewis**, Director



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.

### PROPOSED SLATE OF OFFICERS 2016-2017

**Pat Robertson**, President  
**Wayne Pettigrew**, President Elect  
**Leah-Anne Janway**, Past President/Legislative Chair  
**Devin Kampert**, Vice President  
**Carrie Cox**, Secretary/Education/Program Chair  
**Andy Bigbie**, Treasurer  
**Diane Barton-Lewis**, Director  
**Kemp Cole**, Director/Corporate Sponsor Chair  
**Laurie Crow**, Director/Public Service Chair  
**Jimmy Johns**, Director/HUPAC Chair  
**Connie Morgan**, Director  
**Jeff Walraven**, Director/Awards Chair  
**Nancy Purkeypille**, Director/Membership, Retention  
 Chair  
 Non-Voting Members:  
**Deborah Buck**, Communications Chair  
**Jana Pitt**, Hospitality Chair  
**Jeanean South**, Media Relations Chair  
**Tom Tacheny**, Website Chair

Joined NAHU	Association Member
2000	Lynn Crandall Michael Dollins Don Hensley Jim Scheihing Karla Tull
2001	Diane Barton Lewis Thomas Hamilton Timothy McFall Randy Schreier
2002	Janice Gilley Jeannie Surles Jeff Walraven
2003	Robert Barnett Andy Bigbie William Case Kemp Cole Carrie Cox Jim Hampton Brenda Hartpence Jimmy Johns Steve Lanier Chuck Paine Jana Pitt Annessa Traynor

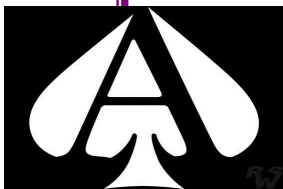
Public Service

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 happened so far:**

July 2015, OKAHU donated \$50, sold \$43, Total \$93. Curtis Liles pulled the Ace of Clubs  
 August 2015, \$64 sold, Total \$157. Connie Morgan pulled the Ace of Diamonds  
 October 2015, \$40 sold, Total \$197. Leah-Anne Janway pulled the Eight of Spades  
 November 2015, \$40 sold, Total \$237. David Morgan pulled the King of Clubs  
 January 2016, \$50 sold, Total \$287. Shelby Faust pulled the Queen of Diamonds.  
 February 2016, sold \$37, Total \$324. Pat Robertson pulled the Ace of Hearts.  
 Laurie presented a check to the Toby Keith Foundation at our most recent CE Seminar (photo left) for \$150.

**This leaves our winnable pot at \$162!**  
 Cross your fingers for a May WINNER....



**Mission**

The Toby Keith Foundation exists to encourage the health and happiness of pediatric cancer patients and to support OK Kids Korral, a cost-free home for children undergoing treatment for cancer.

**About Us**

The Toby Keith Foundation has been helping children with cancer since 2006 and continues its services through partnerships with hospitals, caregivers, foundations and civic groups. The Toby Keith Foundation's focus is providing a housing solution for pediatric cancer patients. "If we can alleviate stress on a family, encourage a brother or sister and comfort a sick child, then we will make a difference in the fight against cancer." -Juliet Nees-Bright, executive director of The Toby Keith Foundation.



**Goal**

The goal of OK Kids Korral is to provide the warmth and security of home for pediatric cancer patients and their families. OK Kids Korral also offers services such as meals for the families, free laundry, complimentary internet through the house, computers/printers, movie nights, crafts and private places for family meetings/counseling.

**About the Korral**

Getting the right care sometimes means cancer patients must travel away from home, often to a cancer treatment facility in another city, which places even more of an emotional and financial burden on families during what is already a challenging time.



OK Kids Korral hopes to make life a little easier for children with cancer by providing a safe, convenient and hopeful place for families to connect with each other and focus on the well-being of their child. OK Kids Korral will provide daytime and overnight lodging for pediatric patients and their families. The state of the art facilities at OK Kids Korral will include a community indoor and outdoor dining area, a game room with games for all ages, a movie theater, an outdoor play area and garden as well as many other amenities designed to create a relaxing haven for the children and their families. "Find out how you can help children and their families in the battle against cancer by visiting <https://www.tobykeithfoundation.org> or contact Laurie Crow at 405 416 8888."

# Corporate Sponsors 2015-2016



Brad Johnson  
johnsonB9@aetna.com  
Phone: 405-945-1206



AMERICAN PUBLIC LIFE  
Expanding the Benefits Horizon™

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



Mike Zundel  
mzundel@assurity.com  
Phone: 402-437-4344



BlueCross BlueShield  
of Oklahoma

Julie Rethmeyer  
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Phone: 918-551-3366



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Tom Bartlett  
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Phone: 405-607-2629



RESERVE NATIONAL

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Phone: 405-848-7931



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



Dennis Grubbs  
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FAX: 405-290-5771



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

Sue Wilson Brokerage Inc

"Working Together, Finding Solutions"

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



Alvin Heggie  
Alvin.heggie@sunlife.com



Nancy Purkeypile  
Nancy.purkeypile@tasconline.com  
Phone: 800-422-4661, Ext. 8884



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Steve Lanier  
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405-415-8148



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FAX: 972-892-1440



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

PHOTO GALLERY — DAY AT THE CAPITOL & SPRING CE SEMINAR

