

FAREWELL LETTER FROM THE PRESIDENT

July 2025



As July melts away, literally, it brings a new board year and new leadership to our chapter. Our 2025–2026 President, Dana Nursick, is a true gem with a warm and inviting leadership style. Hopefully you were able to attend the June 12 th meeting including installing our new board. If not and you don't know Dana, please take the time to attend a monthly luncheon and introduce yourself. If you don't, you're missing out!

NABIP's Annual Convention in Miami did not disappoint. It was packed with motivating speakers surrounding hot topics. Thank you for sending me to represent the Oklahoma City chapter this year.

The year has flown by, and as I have concluded my term as your chapter President, I would like to express what an honor and privilege it has been to serve the association and our chapter members. It was both a fulfilling and enlightening experience for me. I look forward to seeing all we can do together this upcoming board year.

If you haven't had the opportunity to vacation this summer, I hope you have taken some time for self-care. I love the long, dog days of summer; and hot summer nights are among my favorite things.

“Rest is not idleness, and to lie sometimes on the grass under trees on a summer's day, listening to the murmur of the water, or watching the clouds float across the sky, is by no means a waste of time.” —John Lubbock

Be well!

Jodi Cooper
Immediate Past President, NABIP Oklahoma City

LETTER FROM THE INCOMING PRESIDENT

Let's Lead Together in 2025–2026



Dear NABIP OKC Members,

It is an incredible honor to serve as your NABIP OKC President for the 2025–2026 year. I am grateful for the opportunity to follow in the footsteps of so many dedicated professionals who have helped shape our chapter into what it is today—a strong, respected voice for agents, brokers, and benefits professionals across Oklahoma City and beyond.

As we begin this new chapter, I want to share a few thoughts about where we're headed and how we'll grow together.

Our Mission Matters More Than Ever

We live and work in a dynamic time—one where legislation, technology, and client expectations are constantly evolving. But with change comes opportunity. NABIP OKC will continue to be a reliable resource and community for professionals navigating these shifts. Our mission to educate, advocate, and elevate is more important than ever.

Let's Stay Connected

This chapter is yours. Your voice, your perspective, and your involvement are what will make this a successful year. I encourage you to attend meetings, reach out with ideas, and bring a colleague or two along with you. Whether you're a longtime member or new to NABIP, there's a place for you here.

Thank you for your trust and your commitment to our industry. I'm excited for what's ahead—and proud to walk this path with each of you.

With much appreciation,

Dana Nursick
President, NABIP Oklahoma City

MARK YOUR CALENDAR!

UPCOMING EVENTS

Monthly Meetings: **VENUE CHANGE**

Please join us in the Banquet room at Hopscotch. Hopscotch is located in the shopping center at the corner of N May Ave and W Hefner Rd. The Greens are still undergoing renovations. The meetings will resume at the Greens upon the completion of their renovations.

MEDICARE 101

Michael Weller is an independent life and health insurance agency owner specializing in family protection, with a focus on individual and group benefits, including clients aged 65 and older.



SNEAK PEEK

August 14th - Monthly Membership Meeting!

September 11th - Monthly Membership Meeting!

October 9th - Monthly Membership Meeting!



MEMBERSHIP

For more information on how to become a member or an Annual Partner you can visit our website for details!

Click here for: [Membership](#)

Click here for: [Annual Partner](#)

MEET OUR CE PRESENTER

Michael Weller is an independent life and health insurance agency owner specializing in family protection, with a focus on individual and group benefits, including clients aged 65 and older.

In 1999, he joined the insurance industry as the office manager for Rees Group Insurance Services. Primarily focused on group insurance benefits, he learned the industry and managed accounts with over 800 employees.

He purchased RGIS in 2003 and continued expanding the agency. Solutions to senior health insurance needs include Medicare supplements, Medicare Advantage, prescription drug plans, and other supplemental benefits.

By offering solutions to businesses and individuals, he is proud to protect against unknown expenses and provide families and businesses with peace of mind.

Some products offered are: Medicare plans, annuities, life insurance, group and individual health plans, disability, dental, vision, and home healthcare plans. Services include: Enrollment, administration, employee education, and plan designing for family protection, business succession, charitable giving, asset protection, and retirement.

Outside of work, he is an avid Harley rider. He loves to get on the bike and get out of town for a few days. Together with his wife, they enjoy traveling and finding those "off the beaten path" locations and events. They have two dogs and a cat that keep them smiling and laughing.





NABIP PAC

The NABIP PAC (National Association of Benefits and Insurance Professionals Political Action Committee) is a bipartisan fundraising and advocacy organization that supports congressional candidates who align with NABIP's mission to advance sound health policy. Funded by voluntary contributions from NABIP members, the PAC works to influence legislation that impacts health insurance professionals, brokers, and consumers. By engaging with policymakers, NABIP PAC ensures that the voices of industry professionals are heard in shaping healthcare regulations and policies that promote market stability and consumer choice.

Donating to both the NABIP PAC and the local PAC is essential for protecting and advancing the interests of health insurance professionals at all levels of government. The NABIP PAC supports congressional candidates who advocate for fair and effective healthcare policies, ensuring that lawmakers in Washington, D.C., understand the challenges faced by brokers, agents, and consumers. Meanwhile, the local PAC focuses on state and local legislation, where critical decisions on licensing, state-based exchanges, Medicaid expansion, and insurance regulations are made. By contributing to both, donors help strengthen the industry's voice, influence policies that promote market stability and affordable healthcare options, and safeguard their profession from harmful legislation. Without financial support, key decisions affecting the industry could be made without input from those who know it best.

Legislative Update

July 10,
2025



The NABIP Annual Conference was well-attended by Oklahoma members, including Kelley Harmon, Jennifer Helms, Jodi Cooper, Theresa Clagg, James Ashford, and Tim Brooks. The event featured a wide range of engaging speakers and panels. Notably, Vani Hari, known as the "Food Babe," spoke on food chemicals and has a strong online presence for those wanting to learn more. Connie Podesta addressed interpersonal communication challenges, and entrepreneur Mark Cuban spoke about [costplusdrugs.com](https://www.costplusdrugs.com). A compelling panel on perimenopause and menopause highlighted the impact of these stages on women's health. Additionally, Peter Nelson, Deputy Administrator of CCIIO, shared insights on upcoming CMS Marketplace rules, ICHRA expansion, health data transparency, and policy priorities.

On the federal level, a major milestone was reached with the signing of the One Big Beautiful Bill Act (OBBBA) on July 4, 2025. This bill includes several employee benefit provisions that mark important wins for NABIP. The tax exclusion for employer-sponsored insurance was preserved, and telehealth services can now be offered with no cost-sharing without affecting HSA eligibility—retroactive to January 1, 2025. Employers should update plan documents and consider reinstating pre-deductible coverage. Starting in 2026, direct primary care (DPC) arrangements can also be offered without cost-sharing and still be HSA-compatible, with monthly fee caps of \$150 for individuals and \$300 for families. Furthermore, certain Marketplace bronze and catastrophic plans will qualify as high-deductible health plans (HDHPs), enabling HSA eligibility even if the plan design doesn't typically meet HDHP standards—an important consideration for employers offering ICHRAs or QSEHRAs.

Additional highlights from the bill include an increase in the Dependent Care Assistance Program (DCAP) limits from \$5,000 to \$7,500 starting January 1, 2026. The student loan repayment benefit of up to \$5,250 annually will continue to receive tax-favored treatment, and a permanent 20% deduction for small businesses and sole proprietors was established. However, the bill also introduces tighter rules for ACA eligibility and enrollment, including mandatory eligibility verification, pre-enrollment checks, and limits on Special Enrollment Periods (SEPs) and passive subsidy reenrollment.

Despite these wins, some key NABIP priorities were left out of the final bill. Enhanced ACA premium tax credits were not extended and are set to expire at the end of 2025. Codification of ICHRA/choice arrangements and provisions to allow HSAs for working seniors were also excluded. While transparency requirements for pharmacy benefit managers (PBMs) were dropped, supporters remain optimistic due to bipartisan interest and support from the White House. Meanwhile, the proposed Insurance Fraud Accountability Act was dropped, despite member engagement through an Operation Shout campaign.

At the state level, Oklahoma's legislative session has concluded. Planning is already underway for the next session, and NABIP encourages members interested in shaping future legislation to join the Legislative Committee.

NABIP continues to emphasize its role as a bipartisan organization, advocating for meaningful health policy solutions through collaboration across party lines. Members are reminded to speak with one voice and align with the NABIP Healthcare Bill of Rights, separating personal political beliefs from professional advocacy. This unified approach reinforces NABIP's credibility and influence at every level of government.

Looking ahead, NABIP has launched its 2026 Medicare, Medicare Advantage & Compliance Requirements (MMACR) training—an on-demand program designed to keep members informed and compliant in the ever-evolving Medicare space. Additionally, several educational webinars and podcasts are scheduled this month, including sessions on scalable state leave support, content creation strategies, precision medicine for brokers, Medicare insights, and evolving ICHRA trends.

DEI&B TRAINING

Offered to NABIP members at a discounted rate, this course will guide individuals, members of your organization, and your clients to understand how we can become better leaders, managers, and allies for the modern workplace. This course's foundation will provide the essential steps towards changing the environmental culture, so individuals of diverse backgrounds feel empowered to grow & thrive, not only in the workplace but also within the communities they live and serve. This course aims to provide a necessary foundation of diversity, equity, and inclusion (DEI) in the workplace.

Participants of this course will:

- Obtain a greater understanding of why DEI initiatives need to become part of your organizational strategy & structure to attract new talent
- Learn terminology associated with DEI
- Learn how to identify blind-spots and actionable steps to overcome them
- Learn how to cultivate a healthy diverse workforce driven by leadership

<https://www.nabiptraining.org/courses/details/19208?sc=FDTHHV>

You also have access to a number of online resources

<https://nabip.org/diversity-equity-inclusion-belonging/deib-resources>

NABIP PROGRAMS

LPRT – LEADING PRODUCERS ROUND TABLE

As a NABIP member there is a program designed to reward our members who are outstanding producers. That program is the Leading Producers Roundtable. LPRT qualifiers receive a number of free or discounted educational offerings and other services from us – after all they are the best of the best and we depend on their knowledge and dedication to their industry to help our own organization be the best.

<https://nabip.org/membership-resources/lprt-leading-producers-round-table>

NABIP LEADERSHIP ACADEMY

NABIP's Leadership Academy assists chapter leaders and members to become better leaders in life and NABIP. This 12-module program provides a wide variety of topics touching on many areas to provide students with a well-rounded experience.

The Leadership Academy is open to all active NABIP members. There is no fee for participation. Academy Graduates will receive an electronic button to identify and promote their accomplishment.

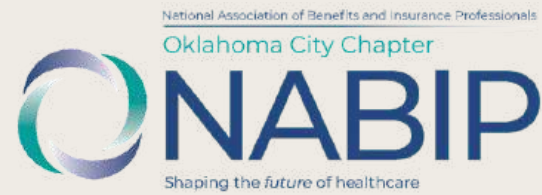
<https://nabip.org/chapter-resources/leadership-academy>

NABIP SUPPORTED CERTIFICATIONS AND DESIGNATIONS

As a NABIP member, you have access to obtain certifications and designations at a discounted rate. These are ideal for employee benefit advisors, consultants, HR, and legal professionals looking to grow their knowledge of public and private healthcare structures. Continued professional development advances careers and provides an edge over the competition.

<https://www.nabiptraining.org/catalog/courses>

Compliance Corner



As insurance brokers professionally trained in risk management, our role is not limited to shopping plans or quoting premiums—we serve as strategic consultants who help protect the long-term viability of our clients’ businesses. One of our primary responsibilities is to assess potential exposures that could adversely impact our clients’ ability to meet their organizational objectives. While risk often brings to mind property damage, liability claims, or rising premiums, regulatory noncompliance represents one of the most underestimated yet financially damaging threats facing employers today.

Federal laws governing insurance, labor, and tax requirements are vast and constantly evolving. From the Affordable Care Act (ACA) and ERISA, to COBRA, HIPAA, and the Internal Revenue Code, employers are expected to navigate a complicated and sometimes contradictory web of rules and deadlines. This is especially difficult for small and mid-sized businesses that may lack dedicated HR or legal teams. Even large employers with internal departments often rely on their brokers to interpret regulatory changes and offer real-world solutions to maintain compliance.

Recognizing this need, NABIP created the Compliance Corner—a powerful tool designed to empower brokers with up-to-date, centralized information. This one-stop online resource gives members access to the majority of federal statutes, guidance documents, and compliance alerts that directly affect the employee benefits industry. Whether you're advising on the tax implications of ICHRAs, helping a client amend their cafeteria plan midyear, or ensuring eligibility requirements are met under the ACA, the Compliance Corner streamlines your research process and equips you with the confidence to provide timely, accurate guidance.

By leveraging the Compliance Corner, brokers can deepen their client relationships, reduce liability exposure, and position themselves as trusted experts—not just salespeople. It also enhances our ability to educate clients proactively, ensuring they remain informed of regulatory updates before they become costly problems. In an increasingly complex compliance environment, this resource isn't just helpful—it's essential.

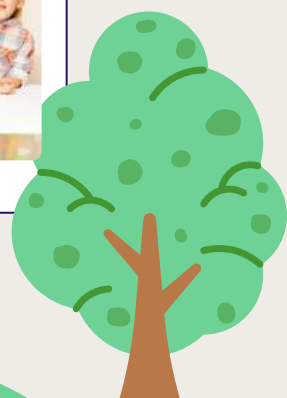
<https://nabip.org/membership-resources/compliance-corner>

OK KIDS KORRAL



Real stories of joy and growth
from our community

OK Kids Korral is a facility in Oklahoma City that provides free lodging and support services for children battling cancer and their families. Operated by the Toby Keith Foundation, it offers a home-like environment for families traveling to Oklahoma City for pediatric cancer treatments, helping to reduce the financial and emotional burdens during their care. The facility includes private suites, playrooms, kitchens, and other amenities to make families' stays more comfortable.



ANNUAL PARTNERS

PLATINUM PARTNER



Vision Care Direct: Vision Care Direct of Oklahoma is a provider-owned vision insurance company offering affordable plans for individuals, families, and businesses. It partners with local optometrists to provide comprehensive eye care, including exams, glasses, contact lenses, and discounts on procedures like LASIK.

GOLD SPONSOR

- Blue Cross Blue Shield Of Oklahoma
- Beyond Health

SILVER SPONSORS

- Manhattan Life
- Taber Brokerage
- United Healthcare
- The Standard
- NueSynergy
- Delta Dental

BRONZE SPONSORS

- Emerson Rogers
- Sue Wilson Brokerage
- American Fidelity Admin services
- CRC Benefits