



NABIP Utah General Board Meeting Minutes

Oct. 1, 2025 9:00 AM – 10:00 AM

Attendees: Andrew, Nicole, Ali, Lindsay, Larry,
Roya, Clint, Erick

Absent: Ernie, Conner, Matt

Anti-Trust Statement

Associations are subject to strict scrutiny under antitrust laws because an association is by its nature, a group of competitors joined together for a common business purpose. The antitrust laws require companies to make certain decisions by themselves, not in conjunction with competitors. Therefore, associations and their members must proceed with extreme caution in certain areas of activity to insure against violation of antitrust laws. Discussions of current or future prices or commissions and refusing to deal with or boycotting any insurance carrier are among a number of areas specifically prohibited by the antitrust laws and will not be permitted in today's meetings. Read By Ali

Last month minutes -

Upcoming Events

- Oct. 7 NABIP Utah Brokers Edge Jane Ann Craig ICHRA and MEC.
- Nov ?
- Dec Future Leaders Community Service Event? With CE.
- Jan night with legislators
- Day on the Hill Jan 22
- Feb?
- March?
- April?
- May 19 Golf
- May 20 Elevate
- June?

Chair Updates

- Legislative Updates
- Secretary
- Treasurer
- Professional Development
- Communications
- Media
- PAC
- Membership
- Member Retention
- Community Service - N/A
- Awards
- Executive Director –Meredith
- Lobbyist - Evelyn

Other Business

2025-26 Budget

Next Meeting 9 am on Nov. 5,

Event Planning and Calendar Review

The meeting began with Meredith and Andrew discussing logistics for an upcoming event on October 7th, which has 43 registered attendees so far. Ali read the antitrust statement at the start of the meeting. Andrew and Meredith addressed an issue with a Google Meet invitation that had been sent by mistake. The main focus of the meeting was to review the upcoming calendar and discuss preparations for next week's event, which Larry will be speaking at.

NABIP Continuing Education Updates

Andrew Theis outlined upcoming events for NABIP, including monthly Continuing Education (CE) sessions, with October 7th and November dates confirmed. He noted that recent CE events have seen increased attendance, with the last one drawing around 17-18 participants. For December, Andrew plans a community service event that will combine with the Future Leaders program, and he encouraged board members to participate and help promote attendance among association members.

Upcoming Events and Sponsorships

The team discussed upcoming events, including the Day on the Hill scheduled for January 22nd and the Night with Legislators, which Evelyn is organizing. They also talked about the annual golf tournament on May 19th and the Elevate event on May 20th, with Andrew mentioning he had met with a keynote speaker from Willis Towers Watson. The group emphasized the importance of securing sponsorships for the Elevate event, with Meredith noting that now is a good time for vendors to commit funds before year-end budgets are reallocated.

Email Templates and Sponsorship Updates

The group discussed two main topics: email templates and sponsorship payments. Nicole inquired about creating new email templates and scripts, which NABIP confirmed would be developed, focusing currently on promoting the October 7th event. The team noted that most sponsors had paid, though there was an outstanding payment from Marathon Health for a lunch sponsorship that NABIP will follow up on. The conversation ended with details about setup for the October 7th event, where members were asked to arrive at 7 AM to help set up tables and chairs before the 8 AM start time, with technical support arriving around 7:30 AM.

PAC Meeting Logistics and Technology

Andrew Theis outlined the logistics for an upcoming meeting, including breakfast arrangements, a hybrid presentation schedule, and a QR code-based sign-in system for continuing education credits. He emphasized the importance of promoting PAC participation and encouraging non-members to join, offering a \$50 discount for first-year dues. Andrew also requested assistance from attendees in facilitating these initiatives and adapting to the new technology-driven sign-in process.

Event Logistics and Promotion Planning

The team discussed logistics for an upcoming event, emphasizing the importance of participants signing in on time to receive continuing education (CE) credits. They agreed to remind attendees about this policy during sign-in. Andrew and Nicole encouraged everyone to continue promoting the event, aiming for 65-80 registrations, and discussed sending invitations to various organizations and contacts. The team also planned to have enough staff for setup and to help with the event, with Erick and others offering to arrive early to assist.

Event Registration Strategy Discussion

The team discussed strategies to boost registration numbers for an upcoming event, focusing on reaching out to various insurance agencies and contacts. Andrew planned to ask Mike to promote the event during lunch, while Clint and others offered to contact

specific agencies like Compass and NFP. Nicole suggested sending a personalized invitation to Tracy Farris, the treasurer of NAIFA, and NABIP agreed to update the flyer with a more user-friendly link. The team also discussed the need to create a sense of urgency around the limited spots available, with Erick planning to inform GBS about the remaining dozen seats.

Event Planning and Membership Updates

The team discussed several key topics including budget approval, event planning, and membership applications. Andrew will send out the budget for review and approval, with a request for responses by the end of the day.