



NABIP Utah Board Meeting Minutes – Strategic Planning Meeting

March 19, 2025 9:00AM – 10:00AM

Attendees:

Anti-Trust Statement Read by: Kortnie Lawrence

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.

NABIP Utah Updates:

- Next Year leadership board:
 - President: Andrew Theis
 - Secretary: Bryce Goodan
 - Treasurer: Roya Hedlund
 - Past President: Nicole Kuhni
 - Legislation Erick Kuhni
 - PAC: Ernie Sweat
 - PD: Matt Wells
 - Communications: Larry Long
 - Membership: Lindsay White
 - Level Funding: Mike Starks
 - Medicare liason: Christian Brindle
 - Public Service: Open
 - FLN: Nicole Kuhni
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- Membership: holding steady between 205-210 fluctuations monthly
- Future Leaders Network: need to identify obstacles for more involvement

Events:

- Future Leaders Network -
- NABIP-UT Happy Hour: tied into a charity event
- Membership Appreciation – Charity event and membership
- UT-Consultant License Exam Prep: Didn't make enough revenue to cover cost
- Charity Event: Fall event had low participation - will ry again
- Charity Event: Spring – possible Toys for Tots or other support for children

Takeaways:

1. Focus on legislation - create a committee to meet monthly and invite in the membership. These meetings will be set with primary goal of identifying the "voice and tone" of the UT chapter as well as to create inroads with more legislators. We will set a budget to hire out an attorney to help draft/craft legal language to make NABIP UT more effective on the Capitol to be heard and seen

2. Charity events- when polled members wanted to do more with this however participation has been lacking. we will continue to do so and set better reminders for attendance. Perhaps try "off months" to do so

3. Rather than set a "freshman orientation" 2-3 board members will invite new members to lunch to get to know them and encourage camaraderie.

4. Continue to focus on the board members to participate on meetings, LPRT, and PAC donations

5. Continue to work sponsorships and find more "New" sponsors to come in - continue to work on technology angle

6.

Parking Lot

- Charity event details in the works
- Elevate Utah – CE based possible changes to event schedule

Adjourn – By Nicole Kuhni