



## NABIP Utah General Board Meeting Agenda and Minutes

March 4, 2026 at 9:00 AM – 10:00 AM

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Attendees: Andrew, Ali, Matt, Ernie, Larry, Nicole,  
Meredith

Absent:  
Roya, Lindsay, Clint, Erick

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### 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.

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### Last month minutes -

Feb.5, 2026 Minutes

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### Upcoming Events

- Weekly Leg calls through March 12
- March? March 26?
- April? Medicare CE?
- May 19 Golf
- May 20 Elevate
- June?

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### Chair Updates

- Legislative Updates
- Secretary
- Treasurer
- Professional Development
- Communications
- Media
- PAC
- Membership
- Member Retention
- Community Service - N/A
- Awards

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### Other Business

Chairperson for Golf Outing  
Sponsorships 2026  
CEs for Elevate

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Next Meeting 9 am on April 1

## AI Meeting Minutes:

The meeting officially started at 9:05 AM with Andrew, Meredith, Ali, Larry, and Ernest present.

### Elevate Utah Event Planning

The meeting began with Andrew reading an antitrust statement, emphasizing the importance of avoiding discussions about current or future prices and boycotting insurance carriers. The group then discussed scheduling for an upcoming Elevate Utah event, with Andrew seeking feedback on their current plan and noting some open spots for CEs. They also addressed the rescheduling of a meeting with Evelyn, deciding to keep it on the 11th due to concerns about meeting updates not reaching all participants.

### Spring Meeting and Events Planning

The team discussed upcoming meetings and events. Andrew informed the group that Evelyn will be on vacation next week but confirmed the meeting on the 11th. Ernie agreed to reach out to Evelyn for topics to discuss. Andrew mentioned meeting with a potential CE presenter for March 26th, with a backup option if needed. For April, Evelyn is exploring the possibility of organizing a Medicare town hall with federal legislators, though a final decision is pending. If this isn't feasible, they will proceed with a CE in April, with a topic to be determined.

### Medicare CE Event Planning Meeting

The group discussed their limited involvement with Medicare, acknowledging that half of their membership deals with it, and planned a CE event in May to address issues facing brokers in that space. They also mentioned an upcoming golf tournament on May 19th and an Elevate event on May 20th, with Andrew requesting help from members to set up and manage the event.

### Golf Tournament Fundraising Plans

The group discussed plans for an upcoming golf tournament, including a successful 50-50 raffle and licorice fundraising activity from the previous year. Ernest mentioned he would be in Europe during the tournament but offered to organize the raffle, noting they should double the amount of licorice purchased last year. Andrew suggested adding a hole-in-one contest to draw more participants, confirming with Ernest that such contests are allowed in Utah, though they would require purchasing an insurance policy costing between \$200 and \$400.

### Golf Tournament and Elevate Planning

The meeting focused on planning and challenges related to the upcoming golf tournament and Elevate event. Andrew and Meredith discussed strategies to increase participation, including potential adjustments to sponsorship and foursome pricing, though Ernie noted concerns about making changes too close to the event. They agreed to review tournament outcomes and sponsorship strategies during the summer strategic planning session. Andrew highlighted the need for additional sponsors and emphasized the importance of finding a new president to succeed him, while also encouraging board expansion. Ali agreed to help with sponsorship outreach, and Andrew mentioned a pending meeting with Select Health to clarify their involvement. The group also discussed the need for a fourth continuing education topic for the Elevate event and agreed to revisit the involvement of national organizations at a later date.