



## NABIP Utah General Board Meeting Agenda

May 6, 2026 at 9:00 AM – 10:00 AM

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Attendees: Andrew, Nicole, Roya,, Erick, Ali,  
Matt, Clint, Larry, Meredith

Absent:  
Lindsay, Ernie

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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 -

April , 2026 Minutes

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### Upcoming Events

- 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

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### Next Meeting

9 am on June 3

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## **Summary**

### **Elevate Utah Conference Planning**

The meeting focused on planning for the Elevate Utah conference. NABIP reported that two additional CEs were approved, with only Christian's approval still pending. The conference schedule was outlined, including breakfast at 7:30, CEs starting at 8:15, a keynote with Andy Neary, and officer installations. The team discussed the awards ceremony, with Andrew seeking recommendations for recipients, particularly for national awards that require specific categories to be given out.

### **Legislator Award Cancellation Decision**

The team discussed the Legislator of the Year award and decided to scrap it for this year's event due to concerns about attendance numbers and timing constraints. They agreed to put the decision to the membership for a vote with a two-day turnaround. The group confirmed the agenda for an upcoming event, including two continuing education sessions on AI and healthcare payment systems, with a total of 88 registered attendees expected, including 55 paid attendees.

### **Event Layout and Vendor Planning**

The board discussed the upcoming event layout and flow, with Andrew explaining the new design aimed at improving engagement between attendees and vendors. NABIP reported removing some tables due to lower than expected sponsorships, bringing the vendor count down to 16. Erick emphasized the critical importance of member-vendor interactions for the event's success, while Andrew noted plans to bring new board members who will focus on membership and engagement. The group also discussed table arrangements, with Matt suggesting offsets for better visibility, and considered branding options for the board.

### **Event Planning and Logistics Discussion**

The board discussed wearing coordinated shirts to enhance their professional presence at an upcoming event. Roya expressed a concern about covering her tattoos and suggested a quarter-zip option, which the group agreed to explore. NABIP and Roya will handle finding appropriate shirts for everyone. The group also discussed implementing a digital sign-in process using a Google Doc, similar to their previous Broker's Edge event, with paper options available for those needing assistance. Additionally, they discussed the need for someone to manage technical aspects during the event, including ensuring speakers are properly connected for their presentations.

### **Golf Tournament Planning Meeting**

The team discussed event logistics, with Roya agreeing to help with registration starting at 7 AM and Meredith tasked with speaking to Crystal about switching presenters. The group identified a significant gap in golf tournament participation, needing 38 more golfers to reach the target of 72 players, with a \$480 foursome package available. The team agreed to share a payment tracker to avoid duplicating outreach efforts to providers, and Matt suggested exploring opportunities with GBS brokers to increase participation.

### **Golf Event Attendance Strategy**

The team discussed efforts to increase attendance for an upcoming golf event associated with their NABIP conference. They identified specific brokers and contacts from various insurance companies to reach out to, including USI, Trucortia, Mercer, and CUI. Meredith expressed concerns about the financial viability of continuing the golf event, noting it hasn't been profitable and may need to be reconsidered for next year. The group agreed to focus on filling the current event with attendees, particularly highlighting the variety of continuing education offerings and vendor participation as strengths of the conference.

### **Event Registration and T-Shirt Planning**

The team discussed event registration, noting 55 attendees so far with two weeks remaining before the event. They addressed t-shirt arrangements for the event, with Roya and Meredith tasked with determining sizes and options, including considering quarter-zip shirts and accounting for different size needs like Matt's 3XL. The discussion included exploring local versus online vendors for t-shirt printing, with Custom Ink being considered as a potential option.