



## Agenda (items subject to change)

### Sunday, February 27

11:45 a.m.

Leadership Forum Check-in

12:00 p.m. – 4:30 p.m.

Leadership Forum (for chapter leaders) – Livestream

2:00 p.m. – 5:00 p.m.

Capitol Conference Registration

5:00 p.m.- 5:45 p.m.

Breakout Sessions – Livestream (Virtual Attendees)

- *Hot Topics: State Issues*
  - *Steve Cain, director and national sales leader, LTCI Partners, LLC*
  - *Mike Wojcik, senior vice president and principal, The Horton Group*
  - *Jennifer Stanley, regional compliance consultant, employee benefits at Alera Group*
  - *Mike Smith, president, The Brokerage Inc.*
- *Is Parity Working? Mental Health & Substance Use Disorder Claim Advocacy for Brokers*
  - *Diedre Kennedy, president, BenAssist Health Insurance Services, LLC*
  - *Janet Powelson, health plan services manager, Brown & Brown of Northern California*
  - *Lizz Ortolani, president, Ortolani Services, Inc.*

7:00 p.m. – 10:00 p.m.

HUPAC Event – Penn Social (801 E St NW)

### Monday, February 28

7:30 a.m. - 5:00 p.m.

Registration

7:30 a.m. - 8:00 a.m.

Continental Breakfast with Sponsors

8:00 a.m. - 9:00 a.m.

Breakout Meetings for:

- *State and Local Legislative Chairs*  
*This will serve as a training session for new and current state and local legislative chairs, including a panel of experienced legislative chairs.*
- *HUPAC Chairs*
- *Media Chairs*

9:15 a.m. - 12:00 p.m.

General Session

- *Welcome*
- *Introductions of NAHU Board of Trustees, HUPAC Board of Trustees, and NAHU Legislative Council*
- *Expectations of Event*
- *HUPAC and Legislative Awards*
- *Keynote: Amy Walter, Cook Political Report, host of The Takeaway*
- *Federal Priorities Briefing*
- *Legislative Forum*

12:00 p.m. - 1:15 p.m.

Lunch on Your Own

1:15 p.m. - 2: 15 p.m.

General Session

- *Department of Labor, Broker Compensation Disclosure Bulletin*
- *Katie Keith, Health Affairs*
- *Randy Pate, Randolph Pate Advisors and former Director of CCIIO*

2:15 p.m. – 2:45 p.m.

Afternoon Break with Sponsors

2:45 p.m. – 3:30 p.m.

Breakout Sessions - Livestream (Virtual Attendees)

- *Medicare Trends with Nicholas Uehlecke, Todd Strategy Group and former senior advisor at HHS*
- *Charting the Course to Compensation Transparency with Dan Meylan, senior vice president of broker relations at Payer Compass and author of “The Path”*

3:45 p.m. – 4:30 p.m.

Breakout Sessions – Livestream (Virtual Attendees)

- *Beyond the ACA the New Horizon of Healthcare Reform with Paul Roberts, director of education and market development, Word & Brown General Agency*
- *The New Broker and Consultant Compensation Disclosure Rules: What You Need to Know with Stacy H. Barrow, partner, Barrow Weatherhead Lent LLP*

4:45 p.m. – 5:30 p.m.

Regional Meetings

- *Region 1 - CT, ME, MA, NH, NY, RI, VT*
- *Region 2 - DE, DC, MD, VA, NJ, PA*
- *Region 3 - IL, IN, KY, MI, OH, WV*
- *Region 4 - MN, IA, NE, ND, SD, WI*
- *Region 5 - AL, FL, GA, MS, NC, SC, TN*
- *Region 6 - AR, KS, LA, MO, OK, TX*
- *Region 7 - AZ, CO, ID, MT, NM, UT, WY*
- *Region 8 - AK, CA, HI, NV, OR, WA*

5:30 p.m.

Dinner on your own

## **Tuesday, March 1**

7:00 a.m. - 8:00 a.m.

Continental Breakfast with Sponsors

8:00 a.m. - 8:45 p.m.

Breakout Sessions – Livestream (Virtual Attendees)

- *Compliance Corner Live!*
  - *Jennifer Berman, CEO and co-founder of MZQ Consulting, LLC*
  - *Annette Bechtold, senior vice president of regulatory affairs and reform initiatives, OneDigital*
  - *Barbara Gerken, vice president and director of employee benefit compliance, First Insurance Group*
  - *Samantha Malovrh, vice president of compliance consulting, OneDigital*
- *HRA Council and ICHRAs*
  - *Jack Hooper, HRA Council, Take Command*
  - *Mark Mixer, HRA Council*
  - *Robin Paoli, HRA Council*
  - *Regan Olson, HRA Council, Take Command*

9:00 a.m. – 12:00 p.m.

General Session- Livestream (Virtual Attendees)

- *Ellen Montz, Deputy Administrator and Director of CCIIO*
- *Members of Congress, including:*
  - *Sen. Steve Daines (R-MT)*
  - *Rep. Adrian Smith (R-NE)*
  - *Rep. Lauren Underwood (D-IL)*
  - *Rep. Ron Estes (R-KS)*
  - *Rep. Josh Gottheimer (D-NJ)*
- *Industry Speakers*
- *Town Hall*

12:00 p.m. - 1:00 p.m.

Lunch on your own

1:00 p.m. - 5:00 p.m.

Lobbying with Members of Congress  
*Member-arranged visits with Congressional representatives.*

4:00 p.m. - 6:00 p.m.

HUPAC Reception (ticket required)

- *Attendees of this intimate open-bar reception will get to mingle with approximately 15-30 members of Congress.*

**Wednesday, March 2**

8:00 a.m. - 9:30 a.m.

HUPAC Capitol Club Breakfast (by invitation)

9:00 a.m. - 5:00 p.m.

Lobbying with Members of Congress

- *Member-arranged visits with Congressional representatives.*