

July 2024 Issue 23 Volume 252

Mission Statement: To prepare our members to best serve their communities and represent our industry through education, shared experiences, and motivation

Next Meeting: 9:00 AM



MID-AMERICA science park

Thursday, July 11th 821 S Lake Road South Scottsburg, Indiana *Room 126*





9:00 AM to 9:30 AM: Business Meeting with Chapter Updates & Legislative Reports; Report from the 2024 NABIP Convention; Our new Website; Announcement and Presentation of Member of the Year!

9:30 AM: Guest Speaker J. Scott Waters, IV TOPIC: *"What is New in the Law for Small Business and Estate Planning"*

Testimonial: "Years ago I met with Scott on some personal estate planning and I was extremely pleased with his knowledge and fairness in pricing. I wasn't rushed and anytime I've had questions he is always there to answer them. I've also referred a friend to Scott and my friend called me and thanked me for sending him to Scott. He is a friend of our Chapter with past presentations on Beneficiaries and Estate Planning. Scott is truly a gem both personally and professionally!

Charlie Mayberry

OUR PREZ SAYS...



Hello fellow members.

I just got back from Chicago and the National Convention. What a superb event! I hope you really plan to go to Miami next year.

The information regarding Group, Medicare and Prescriptions was comprehensive and well presented! The efforts of NABIP, who is working to protect our business, our clients, and the future of healthcare, is fantastic. Our leadership is exemplary in the desire to ensure our association is on the right track in getting our legislative representatives the knowledge to make the laws and rules we need in our country.

We have a new NABIP President! Alycia Riedl. She is going to be awesome as our President. I look forward to working with her in making our Chapter even better. We met with and heard Jessica Brooks-Woods, NABIP CEO, speak. I tell you she really is a bright star for us.

What I enjoyed most of all was the networking with other members and other State and Local Chapter Presidents. What I experience and learned confirms we are an awesome association! You need the work NABIP is doing for healthcare legislation if you are going to be in this business 10 years from now. Most importantly, you need to be INVOLVED!

Charlie

Charlie Mayberry, NABIP/ South Central Indiana Chapter President

CHAPTER LEADERSHIP 2024-2025

President: Charlie Mayberry	Immediate Past President : Charlie Mayberry
President Elect:	Secretary: Jessica
Johnny Reliford	Croquart
Treasurer: Andrea	Legislative: Larry
Bogard	Mayfield
Communications :	NABIP/Pac : Ky
Andrea Bogard	Yarling
ISAHU-Pac: Larry Mayfield	Professional Development : Libertie Villalpando
Awards/Vanguard:	Membership:
Jessica Croquart	Johnny Reliford
Retention: Greg	Media Relations:
Allen	Laura D'Antoni
Social Media: Jessica Croquart	Committee Assistants: Kaitynn Loy Christina McGinley

A Goal without a Plan is just a WISH.

Announcing the NABIP South Central Indiana Website!

While it is still a work in progress we have launched NABIP South Central Indiana (nabipsci.org)! Take a look and provide your feedback to me at dantonil@hotmail.com or via phone/text at 470-227-4504. Currently we are focused on the basics for the website which include our Home Page, our Chapter News and Events, acknowledging our Partners, and information about NABIP/ Pac. Future enhancements will include information about the ISAHU-Pac, links to other websites of relevance to our members and other pertinent information relating to NABIP on the national, state and local chapter levels.

I will review our website during our July meeting so that you can see its current offerings and entertain any suggestions for improvement. Once you have viewed the website and I have incorporated your feedback, I will work with NABIP to have our site linked to the national website.

Laura D'Antoni Media Relations Chairperson



July 11th – Scott Waters, Attorney August 8th – Annual CE Day **5** hours September 12th – 9/11 Remembrance October 10th - TBD

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All financial records are available for review. Contact Andrea Bogard, Treasurer, at <u>ABogardInsurance@yahoo.com</u>. Copies of the By-Laws are available. Contact Jessica Croquart, Secretary, at <u>Jessica.Croquart@SIHO.org</u>



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South Central Indiana July *Member* Anniversaries

CATHY DUNN – 24 YRS. TAMMY GILES – 22 YRS. GEORGE KRAFT – 3 YRS. JOHNNY RELIFORD – 2 YRS.





Midwest Insurance Marketers of America

At *Midwest Insurance Marketers of America*, we strive to assist our Benefit Advisors in placing and maintaining their client customer base with the quality insurance carriers we represent. Since 1988, our agency has assisted Benefit Advisors in placing over

primary market has been major medical coverage for employer groups or individual families.

In the last decade, we have expanded our service into a full circle approach for our Benefit Advisor and their client customers. Not only offering quality health insurance coverage, but complete insurance protection for the Senior arena,. We have established multiple levels of coverage through our full circle approach; major medical, senior planning, and financial products. *Phone: 317-328-0800* On June 13th the South Central Indiana Board of Directors and Committee Leaders met in an extended session to train and plan for our calendar year starting July 1, 2024. In between notes, outlines, presentations and brainstorming, lunch was served! We are excited to see what is in store for our chapter for this next year and are extremely excited to have new members serving this year. Their ideas, enthusiasm, and commitment are a breath of fresh air and bodes well for the future!





Lto R: Charlie Mayberry, Laura D'Antoni, Greg Allen Libertie Villalpando (plus1!), Andrea Bogard, Larry Mayfield, Ky Yarling, Johnny Reliford. (Unable to attend: Jessica Croquart)



Jess & Sandra Carrasquillo (co-founders)

Jess and Sandra offer a full-service insurance agency that concentrates in the senior market. We represent many of the top-rated insurance carriers when it comes



to Medicare and provide our clients with plans that fit their individual needs. We take the time to explain all your options in a simple and concise manner. Our staff is available for assistance with questions, claims, and concerns. With over **20** years of experience, our philosophy has always been to treat you wutg respect and to provide our services with honesty and integrity.

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If you are unable to attend our July meeting in person, but would like to participate, we will be live-streaming it. You do not have to have the Teams app on your device. You can join by clicking on the link from Charlie Mayberry (<u>Cmayberry812@gmail.com</u>) close to our meeting date. IF you have been having difficulty joining the meeting, we want/need to know. Contact Charlie directly so he can help! Have Medicare questions? I have answers. Tom Leix Licensed Sales Representative 7440 Woodland Dr. #100 Indianapolis, IN 46278 317-405-3919, TTY 711



JULY Charity of Choice:

CARDINAL RITTER BIRTHPLACE FOUNDATION INC

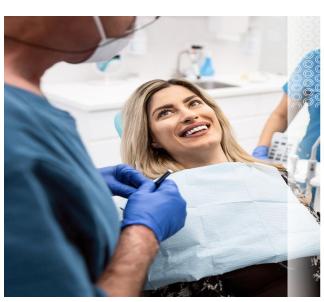
New Albany, Indiana

Our Mission: To promote the legacy of Cardinal Ritter through activities that preserve his commitment to social justice, ecumenism, and service to others (suggested by Scott Waters, July Guest Speaker)

JULY Collection Item:



U Just a suggestion for future donations . . . The smaller the quantity, the more families reached. For example a 24 ounce bottle of dish detergent will serve one family. Three 8 ounce bottles of dish detergent will serve three families.



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The following members are our South Central Contributors:

Greg Allen, Andrea Bogard, Larry Mayfield, Dave Dionne, Bridget Redmon, Larry Isom, Tammy Giles, Jessica Croquart, Nancy Swank, Ky Yarling, Charlie Mayberry, Dave Shymkus, Dana Loy, Johnny Reliford, Beverly Miller, Laura D'Antoni, Scott Allman

Laura and Scott were presented new NABIP/Pac contributor pins by Ky, NABIP/Pac Chairman



Thank you Jennifer Chandler, Laura D'Antoni and Charlie Mayberry for attending our NABIP ANNUAL CONVENTION. We look forward to a firsthand report July 11th!



South Central Members: Have you responded to Christina (<u>Christy@McGinleyInsurance.com</u>) with your <u>Member</u> Directory information?

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South Central received <u>three</u> distinctive awards in 2024, the latest two being presented at National Convention in Chicago!





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