

2025 NASBI Supplemental Benefits Forum



DALLAS MARRIOTT DOWNTOWN

2025 NASBI Forum Sessions @ a Glance

	DAY	TITLE	SPEAKERS
	TUESDAY, September 9		
	11:00–11:50am Plaza Ballroom B/C	Actuarial Professionalism – A Texas-Sized Challenge	Ashlee Borcan, Principal & Consulting Actuary, Milliman, Inc. Matt Fleischman, Executive Director & Actuary, Trustmark
	12:30–12:45pm Plaza Ballroom B/C	★ NASBI Conference Welcome	
	12:45–1:45pm Plaza Ballroom B/C	Lassoing Perspectives	Hilary Hulshult, GBDS, Supplemental Benefit Solutions Director, Avant Specialty Benefits Paul Miehke, Account Executive, MetLife Jeremy Parr, National Practice Leader - Voluntary Benefits, Lincoln Financial Services Lindsey Shirey, Voluntary Benefits Consultant, Gallagher Stephanie Turgeon, National Sales Leader, MetLife
CONCURRENT	2:00–2:45pm Plaza Ballroom B/C	Hitching Wagons: Driving Value Through Claim Integration	Mallory Dube, VP Product, New York Life Matt Ennis, Director of Product, Strategy, & Marketing, Reliance Matrix John Locy, EVP, Head of Partnerships, Pasito
	2:00–2:45pm Pegasus A/B	Living Large & Thinking Big in the Worksite Life Market	Bill Mehilos, Principal & Consulting Actuary, Milliman, Inc. Austin Rombalski, Executive Director & Actuary, Trustmark Tim Sintich, Divisional Sales Manager, MassMutual
	3:00–3:45pm Plaza Ballroom B/C	AI Rodeo: Wrangling Buzzwords into Real- Life Applications	Dr. Alison Baker, VP & Medical Director, Prudential Justin Ito, Senior Advisor for Enterprise Data and AI Marine Corps Forces Cyber Command, CTO - Sequoia Port Manish Mandelia, Principal & Managing Director, Milliman Connect Facilitator: Christy Swain, Director of Supplemental Health Product Development & Management, Prudential
	4:00–4:45pm Plaza Ballroom B/C	Saddling Up for Change: Regulatory Outlook & Insights Under the New Administration	Cindy Goff, VP Supplemental Benefits & Group Insurance, ACLI Tarie Summers, Head of Supplemental Health Products, The Hartford
	5:30–6:30pm	★ Cocktail Hour	

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DAY		TITLE	SPEAKERS
WEDNESDAY, September 10			
CONCURRENT	7:30–9:00am Plaza A	★ Breakfast	
	9:00–9:45am Plaza Ballroom B/C	Roping in the Rules: State Regulators’ Take on Regulatory Hot Topics & Emerging Trends	Latif Almanzan, Director, Life and Health Division, Texas Dept. of Insurance Cindy Goff, VP Supplemental Benefits & Group Insurance, ACLI Tarie Summers, Head of Supplemental Health Products, The Hartford Eric Vieweg, Associate Insurance Examiner, Connecticut Dept. of Insurance
	10:00–10:45am Plaza Ballroom B/C	Value Adds: Hold ‘Em or Fold ‘Em?	Taylor McKinnon, JD, Principal and Compliance Consultant, Milliman Inc. Joe Refano, VP Strategic Partnerships, Care.com Annie Scofield, Sales Director, Vori Health Christy Swain, Director of Supplemental Health Product Development & Management, Prudential Zhivago Velasco, AVP Wellness & Value, Mass Mutual Facilitator: Stephanie Turgeon, National Product Director, MetLife
	10:00–10:45am Pegasus A/B	Navigating the Big Blend: Hybrid and LTC	Robert Eaton, Principal & Consulting Actuary, Milliman, Inc. Marc Glickman, CEO & Actuary, Buddylns Christin Kurelich, Vice President, Supplemental Products, Voya Financial
CONCURRENT	11:00–11:45am Plaza Ballroom B/C	Riding High: Mastering Your Consultative Skills	Mallory Dube, VP Product, New York Life Keanu Vela, Director of Client Solutions, New York Life
	11:00–11:45am Pegasus A/B	Exploring Employee Attitudes and Preferences Toward Supplemental Benefits	Ginger Bates, Director of Research, Eastbridge Danielle Lehman, Senior Consultant, Eastbridge
CONCURRENT	11:45am–1:00pm Plaza A	★ Lunch	
	1:00–1:45pm Plaza Ballroom B/C	Dallas Showdown: Building the Best Offer in Voluntary Benefits	Amanda Desousa, AVP, Supplemental Health, Lincoln Financial Group Kaitlin Hanson, Account Executive, MetLife Sally Sommerville, Manager, Supplemental Health Underwriting, Voya Financial Cierra Sullivan, Manager, Actuarial, Aflac
	2:00–2:45pm Plaza Ballroom B/C	Marketing: Beyond the Flyer	Christine Latore, VP of Insurance, Ansel Health Nicole Williams, Head of Partnerships, Nayya
	2:00–2:45pm Pegasus A/B	Trends and Risk Factors in Short-Term Disability and Group Life Insurance	Kevin Cranston, VP Head of Product & Market Insights, Reliance Matrix Bill Mehilos, Principal & Consulting Actuary, Milliman, Inc. Scott Pushman, Life & Disability National Practice Leader, MetLife Maleiha Russell, VP Life, Absence & Disability Product, Voya Financial
CONCURRENT	3:00–3:45pm Plaza Ballroom B/C	Lone Star Roundtable: Roping in Supplemental Insurance Insights	Lindsay Evans, Director, Supplemental Accounts Underwriting, The Standard
	3:00–3:45pm Pegasus A/B	Bigger Storms, Smarter Solutions: AI and its role in the Evolution of Insurance	Dr. Jerald Martin, VP, Supplemental, Life, Disability Underwriting, USABLE Life
	4:00–4:45pm Plaza Ballroom B/C	Be a Maverick – Improve Your Success through Better Communication	Aaron Monasta, Actuary, Aflac Dan Paffumi, Vice President & Actuary, Prudential Financial Darrell Spell, Principal & Consulting Actuary, Milliman, Inc.
	4:00–4:45pm Pegasus A/B	It’s Time for a Re-Vamp!	Matt Ennis, Director, Strategy, Product & Marketing, Reliance Matrix Jimmy Weck, Consulting Actuary, Milliman, Inc.
	6:00pm	★ Milliman Outing	

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DAY	TITLE	SPEAKERS
THURSDAY, September 11		
7:30–9:00am Plaza A	★ Breakfast	
9:00–9:45am Plaza Ballroom B/C	The Big D(ata): What Market Surveys Reveal About Supplemental Health Insurance	Morgan Blau, Director, Product Pricing - Supplemental Benefits, Voya Financial Jen Howard, Principal & Consulting Actuary, Milliman, Inc. Michael Weiland, Principal & Consulting Actuary, Milliman, Inc.
10:00–10:45am Plaza Ballroom B/C	Don't Tex Me - I'm Enrollin': How Brokers, General Agents, and Enrollment Firms Are Partnering to Transform Supplemental Benefits Enrollment	Dana Lindsey, Vice President, PES-one Andrew Monk, Director, Benefits Education, The Cason Group Jake Sealey, Enrollment Technology Consultant, MassMutual Greg Seymour, VP Employee Benefits, Brown & Brown Lindsey Shirey, Voluntary Benefits Consultant, Gallagher
11:00–11:45am Plaza Ballroom B/C	Big Dilemmas in the Big D: Navigating Supplemental Insurance Regulations	Beth Casey, Senior Compliance Analyst, Milliman, Inc. Carla Fritz, AVP State Filing, Sunlife Daniel Haas, Product Specialist - Product and Underwriting - Travel, Accident & Health, Zurich Cover-More Taylor McKinnon, Principal & Compliance Consultant, Milliman, Inc.
11:45am–12:00pm Plaza Ballroom B/C	★ Closing Remarks	
12:00–12:50pm Plaza Ballroom B/C	Actuarial Wrap-Up: Is it the Heat or the Humidity?	Matt Fleischman, Executive Director & Actuary, Trustmark Bill Mehilos, Principal & Consulting Actuary, Milliman, Inc.



NASBI

National Association for
Supplemental Benefit Insurance

**Accident • Critical Illness • Hospital Indemnity
Life Insurance • Short-Term Disability**

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