

# San Antonio

Association of Health Underwriters



## JUNE INSTALLATION OF OFFICERS

### Inside This Edition

Cover: June Installation

Page 2: President's Message

Page 3: Public Service

Page 4: June Luncheon

Page 5: Casino Night-Change

Page 6: Identity Theft

Page 7: Membership Report

Page 8: New Members List

Page 9: Make Use Of Your Association!

Page 10: Legislative Update

Page 12: Convention Pics

Page 11: TAHU Honoree's

Page 13: Trustee's Corner

Page 14: Calendar of Events

Candid Pictures from the TAHU Convention through out the newsletter.

June is an exciting and busy time. Summer begins, although here in Texas it usually starts in April or May. The kids are out of school and we now look for ways to keep them occupied and safe while we work. We begin taking vacations and trying to spend more time with our families. It is a time to relax a bit.

This is also when our newly elected officers and board members are installed. These are the people who we put in the driver's seat. They have been given the responsibility and trust of the membership to make decisions for us. It is a responsibility each person takes seriously with a desire to do what is best for the San Antonio Association of Health Underwriter's membership.

Sadly our officers and committee chairs don't see a very big turnout for

this important event. The June luncheon is one of the least attended. We are honored each year to have our TAHU President or other TAHU official swear in the officers. Show your support by attending the June luncheon.

Become an active participant in your association. There are a number of places your talents can be used to help make SAAHU even more successful in the coming year. You are the association!

Submitted by; Vickie Lightsey, SAAHU Secretary & Newsletter Chair



**At The TAHU Convention:** Joanna Antongiovanni, Sandy Johnson, Lori Rice, Alison Burkholder, Jenni Whitaker, Linda Behrens and Nicole Scott.



## PRESIDENT'S MESSAGE



This is my last message as President of the San Antonio Association of Health Underwriters. I want to share with each of you how proud I am of this association and those I have had the honor of working with. I have enjoyed serving you and leading a group of dedicated and talented individuals.

We have accomplished some great things this year, winning awards at the Texas Association of Health Underwriter's convention in El Paso last month. Awards were received for Public Service, Membership, Education, Retention and Individual Service (Vickie Lightsey). Our annual golf tournament was a huge success thanks to the efforts of the Public Service Chair, Dayton Hoffman and his committee. Because of their efforts and the participation of our members we were able to donate \$20,000 to the Treehouse Day Program for Autism.

I appreciate the dedication and hard work each board member gave to make this association greater. My deepest gratitude and thanks to all of you. Keep the momentum going as Nicole Scott takes over the presidency next month. "Make It Happen."

Sincerely,  
Will Haff, SAAHU President



## NAHU *NewsWire*



### Welcome to NAHU NewsWire

Beginning June 3, NAHU is pleased to offer a new member benefit, a daily news service in collaboration with *U.S. News & World Report*, called NAHU NewsWire. The NAHU NewsWire is a digest of the most important news reported on health care, health insurance, and health reform during the preceding 24 hours

selected from thousands of sources by the editors of U.S. News Custom Briefings. The NAHU NewsWire will be delivered via e-mail Monday through Friday at approximately 8:00 a.m. Eastern time. Topics covered will include industry news, product news, economic and technology news, important legislative news, and news about NAHU and NAHU members. You will also continue to receive other important information directly from NAHU as you have in the past.

To ensure that you receive NAHU NewsWire, add [NAHUNewswire@NAHU.custombriefings.com](mailto:NAHUNewswire@NAHU.custombriefings.com) to your e-mail address book. If your e-mail system

has a spam filter, please change the settings to allow e-mail messages from [NAHUNewswire@NAHU.custombriefings.com](mailto:NAHUNewswire@NAHU.custombriefings.com) or provide your network administrator with the sending IP address **208.85.54.5** for whitelisting.

We are confident that members will enjoy this convenient new benefit, and we are pleased to bring it to you. Your comments, as always, are welcome.

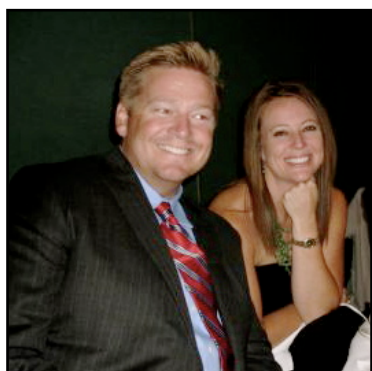
Best regards,

Janet Trautwein  
NAHU Executive Vice President and CEO

PUBLIC SERVICE



**Sandy Johnson**, SAAHU Membership Chair at the TAHU Convention.



**Will Haff**, SAAHU President & **Jenni Whitaker**, SAAHU Trustee

## Important Message!

We have finished the planning stage of the Casino Night. Dayton Hoffman sent out the registration forms.

Participation in Casino Night has not been at the level we would like to see. Due to this issue we now have to postpone Casino Night until August 6, 2008.

Submitted by  
John Bock  
1st Vice President



# TAHU E-NEWS

THE OFFICIAL EMAIL PUBLICATION OF THE TEXAS ASSOCIATION OF HEALTH UNDERWRITERS

**TAHU Members -**

**Check out this Month's Calendar of Events. Read Carolyn's Final Goodbye letter.**

**<http://www.tahu.org/associations/1290/files/TAHUENewsJune2008.pdf>**

Come meet your NEW 2008-2009 SAAHU Board Members!

**What? Saahu Luncheon**

**When? Thursday, June 19 th**

**Where? Sonterra Country Club**

**Time? 11:30 Registration / 12:00 Lunch**

**Program? Installation of 2008-2009  
SAAHU Board Members**

R S V P :  
[gholzworth@chapmanschewebenefits.com](mailto:gholzworth@chapmanschewebenefits.com)

**Cost: Saahu Members: \$20 / Non-Saahu  
Members: \$40**

**PacFund: \$5 per ticket**

**\*Cancellations must be in writing and received within 24 hours prior to the luncheon. Individuals holding reservations will be billed for "no shows".**

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## 2008 10th Annual

## CASINO NIGHT



***Dave & Busters***  
**Wednesday, August 6th, 2008**  
**6:00 PM – 11:00 PM**

**Proceeds to Benefit the American Heart Association**

**\$35 per Ticket - or - \$60 for 2 Tickets!**

*Tickets include Food, 2 Drink Tickets (Beer or Wine), Soft Drinks and \$1,000 in Chips!*

Event Sponsorship Opportunities Starting At \$150 Available.

All Sponsorships will receive free tickets, name recognition and advertising during the event.

	<u>Cost</u>	<u>Number Available</u>
Facility Rental	\$500	1 (receive 6 tickets)
Casino Tables	\$3,000	10 (\$300 each - receive 4 tickets)
Beverage Sponsor	\$500	2 (\$250 each - receive 3 tickets)
Decorations Sponsor	\$150	1 (will receive 2 free tickets)
Food Sponsor	\$2,500	5 (\$500 each - receive 6 tickets)

**Prize Drawing Sponsorship Ideas**



Movie Tickets

Gift Certificate  
Golf Items

Bed & Breakfast/Hotel Room  
Rounds of Golf

Clocks

Special Events Tickets  
Sunglasses

Cash Donations



**OR ANYTHING YOU WANT TO DONATE!**

**LIVE AUCTION & RAFFLE to be held after gaming tables close- NEED DONATIONS!!**

Company Name: \_\_\_\_\_

Contact Person & Phone : \_\_\_\_\_

Type of Sponsorship: \_\_\_\_\_

Number of (additional) tickets (\$35 per ticket or \$60 for 2 tickets): \_\_\_\_\_

Attendees: \_\_\_\_\_

MasterCard

Visa

Discover

Amex

Card Holder Name: \_\_\_\_\_

Billing Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Amount Charged: \$ \_\_\_\_\_

Card Number: \_\_\_\_\_ Exp Date: \_\_\_\_\_ Val Code: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_



**Please complete and fax to Dayton Hoffman at (210) 545-9297 for questions call Dayton at (210) 380-2230. Please make your ck out to SAAHU and mail to: Dayton Hoffman with Standard Insurance at 13750 San Pedro Ste. 440 San Antonio, TX 78216.**

## Identity Theft



At the SAAHU May luncheon Pam Lilly provided a CE on Identity Theft enlightening us on the numerous ways our identity can be taken without our knowledge. Most of us believe we have done what we can to protect against this crime. In today's world the thieves are more technologically advanced than we may think. Pam brought awareness to the responsibility we share in protecting all forms of identity for our customers as well as employees.

Below is an email from Pam with additional information on how Pam's company can assist in the area of Identity Theft.

"It was a pleasure to speak at the SAAHU Luncheon last week. The reception from the members was so warm and welcoming. Would you please inform the attendees of the following?"

I work with Pre-Paid Legal's Identity Theft Awareness Team here in Texas and we provide two programs at no charge to companies.

First we protect the company. FACTA Red Flag Rules as well as Gramm Leach Bliley Safe Guard Rules require continuing education on the handling of non-public information in the workplace.

I provide education on Identity Theft and Security Training on safe guarding non-public information in the workplace. The program is designed to protect the company, the customers and the employees. It is provided at no charge to your company and/or your clients. A written security policy and confidentiality agreements are provided at no charge to assist in compliance with existing laws.

Second thing we do is protect the employees. We furnish Identity Theft Protection and Legal Services for employee as voluntary benefits as a payroll deduction.

Again at no cost the security training program and the benefits takes about 30-45 minutes. And I would be happy to come back to San Antonio to facilitate the training. Please call me to discuss further."

Best Regards,

Pam Lilly  
Certified Identity Theft Risk Management Specialist  
Group Security Specialist  
Pre-Paid Legal Services, Inc.  
[pamlilly@sbcglobal.net](mailto:pamlilly@sbcglobal.net)  
281-703-4777



**Sandy & Linda:** Sandy Johnson and Linda Behrens at the TAHU Convention, in El Paso, TX.

## SAAHU June 13th, 2008 Membership Report

**Current membership: 238 (uh-oh. We slipped)**

Membership goal: 260

Net Members needed: 22

### During May:

Members added: 0

Members lapsed: 12 (I have two coming back on that I know of...)

Changing of the guard: I'm pleased to report Christine Candler of HumanaONE will be your incoming membership chair. Christine is trained, and on line, and ready to go. I'm certain she'll bring enthusiasm, creativity and dedication to this position.

### New member orientation

Our member orientation was June 10<sup>th</sup> at the new BenefitPort offices. We had 5 "new" members or incoming board members attend. The meeting went well I think, and those attending indicated they want to be involved. PLEASE DO NOT LET THIS OPPORTUNITY SLIP THRU OUR FINGERS. Also, Patricia Gillis sent her regrets but would like to help with special events. I gave her Dayton's number.

Thank you to SAAHU for allowing me my 9+ years as membership chair. It's been a truly rewarding experience that I wouldn't trade for anything.

Respectfully Submitted,  
**Sandy Johnson,**  
SAAHU membership chair



## SAAHU NEW MEMBERS

Please recognize all the new members to SAAHU since July of 2007! These members are nearing their first anniversary or are brand new to our association. If you know them, please invite them to our next event and make them welcome. Thanks to all our sponsors!

JOIN DATE	NAME		COMPANY	SPONSOR
7/2/07	Allison	DePaoli	AFLAC	Sandra Johnson
7/12/07	Jennifer	Carr	Miller & Miller	Polly Harris
7/11/07	Eugenia	Ybarra	Humana	Tom Silliman
7/18/07	Lindsay	Bauch	Humana	Nicole Scott
7/25/07	Salas	Frank	Assurant Health	Sandra Johnson
8/6/07	Daniel	Phillips	American Republic	Cathy Cleveland
8/7/07	Tamela	Southan	Health Equity	Sandra Johnson
8/20/07	Giles	Garrison	Eye Med Vision Care	Sandra Johnson
9/5/07	Jenna	Gaspar	Humana	Andrew Grove
9/7/07	Alma	Padilla	Alma Padilla inc.	Linda Behrens
9/13/07	MaryJo	Haselhorst	Business Financial Group	Lynn Weirich
9/13/07	Wesley	DeNeve	Reliance Standard	Will Haff
9/19/07	Dennis	Ellis	United HealthCare	United HealthCARE
9/20/07	Kristen	Gill	Humana	nik newman
10/15.2007	Julie	Loverne	MultiPlan	
10/4/07	Ralph	Pipes	Manhattan Life	NAHU
12/6/07	Bryant	Hamstra	Aetna	john Bock
12/11/07	Lesli	Wood	Humana	Tom Silliman
12/31/07	Cathy	Hill	Verity National Group	Sandra Johnson
12/19/07	Sal	Grosso	Benefitmall	Laura Strahan
1/3/08	Scott	Santese	Aetna	melissa Lopez
1/17/08	Georgia	Jobes	United Healthcare	nunzio Previtera
1/17/08	Gloria	Rivera	United Healthcare	NAHU
1/24/08	kandice	Horton	United Healthcare	nicole Scott
1/28/08	Grace	Saenz	Benefit Management Administrators	sandra Johnson
1/30/08	Nicholas	Ohms	US Health Group	sandra Johnson
1/30/08	Wendy	Ballard	US Health Group	sandra Johnson
1/29/08	Toni	Moore	Group & Pansion Administrators	Lynn Huckaby
1/29/08	Lori	Brown	Group & Pansion Administrators	Lynn Huckaby
2/7/08	Michele	Lemke	eEmployers solutions	Terry Hookstra
2/8/08	Michele	Hardin	Wortham	Will Haff
2/22/08	Scott	Wallace	Wallace & Associates	Cathy Cleveland
2/28/08	Joe	Braley	Aetna	sandra Johnson
3/17/08	Norma	Eureste	Aetna	John Bock
2/25/08	Bubba	Spragins	Shenendoah Life	sandra Johnson
3/18/08	Scott	Sandusky	Sun Life Financial	sandra Johnson
3/18/08	Armando	Polanco	Polanco & Associates	sandra Johnson
4/4/08	Mike	Jones	Group & Pansion Administrators	Lynn Huckaby
4/4/08	Hector	Licon	Blue Cross Blue Shield	sandra Johnson
4/10/08	Paul	Larson	American Public Life	Charles Davis
4/10/08	Jaemi	Correia	Principal Financial Group	Vickie Lightsey
4/11/08	Mike	Boland	Humana	Nik Newman
4/22/08	patricia	Gillis	Colonial	sandra Johnson
4/22/08	esther	Pipoly	Compass Insurance	rusty rice
3/31/08	Catherine	Scarantino	HJA	sandra Johnson
5/8/08	Stace	DuBusk	Five Stones Group	linda behrens
4/25/08	Heather	Arriaga	Colonial	NAHU
4/25/08	Hal	Partenheimer	Colonial	NAHU
4/30/08	Michael	Anderson, PHR	Brumley PEO	Glenn Jones

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## MAKE USE OF YOUR ASSOCIATION!

It is my sincere hope that you the member are taking the time to get as much out of your local association as possible. Take the time to grow your career. The number of years you have in the business is not important. What is important is that you continue to grow each and every year.

The association is poised to accept the responsibility to aid you in your growth. This is achieved in several ways. Through the association you have access to a wide range of information ranging from educational classes to our monthly meetings. If you attend a monthly meeting or enroll in one of the educational classes you might find the one piece of information you've been missing. You have access to producers in the industry who have experienced the same perplexities you may now face. If you call on these individuals, one may be able to help you through these problems. The associations still has much work to do however; to get you the member to come back to see and experience the difference in the programs presented at the monthly membership luncheons. The type of programs brought to you this year are specifically designed to raise the bar by consistently delivering a level of quality unmatched in years past. But, no matter how dynamic and informative the programs are, they

are totally worthless if you do not attend the meetings and benefit from them.

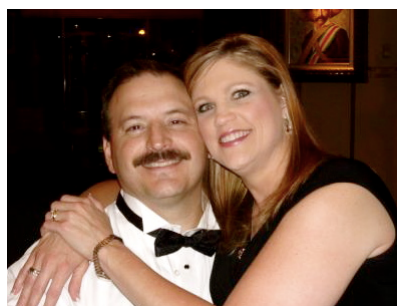
Network! Companies come and go, but the company you keep stays with you forever! Membership opens the door to a variety of opportunities for making new contacts and gain exposure to new ideas. You've heard the old adage a million times: "It's not what you know, it's who you know". Everyone can and should network and yes, this means you. If you don't have time to attend our monthly meetings then make a point to stay informed about what is going on in the industry. Read your local, state and national newsletters and magazines.

Submitted by  
Lori Rice  
Retention  
Chair



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## TAHU CONVENTION, EL PASO, TX





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**LEGISLATIVE UPDATE****Senate to Legislate on Medicare Advantage/Agent Marketing and Sales**

The Senate is nearing consideration of Medicare legislation aimed at reversing a 10.6% cut in physician payments under Medicare that is scheduled to take effect July 1. Doctors say the cut is unaffordable, and they might refuse new Medicare patients if it takes effect, making the issue of high importance to Congress.

But Democrats and Republicans have been unable to agree on how to “pay for” halting the cut, and the partisan ranking came to a head on June 12 when the Democratic majority sought but failed to move a bill without sign-off from key Republicans in the Finance Committee. This past Thursday the majority moved to invoke cloture (ending an effective filibuster) to begin debate on their bill. But the procedural vote failed by a vote 54-39, shy of the 60 votes needed, despite the support of nine Republicans. Had five absent Democrats attended the vote, the cloture motion likely would have succeeded.

Democratic leaders have now conceded they will have to go back and further negotiate on a compromise with Senate Republicans and the Bush administration.

The bill (S. 3101) proposed by Senate Finance Chairman Max Baucus (D-MT) contains numerous Medicare provider payment provisions and beneficiary enhancements in addition to the doctor fix. It also contains significant funding reductions to Medicare Advantage plans, and seeks to legislate new rules on agent and broker marketing and sales communications with Medicare beneficiaries.

Feeling shut out of the process, Republicans offered their own legislation (S. 3118), which also would avert the physicians’ pay cut. The Republican budgetary offsets would not reduce Medicare Advantage funding as much, and would make a couple of small changes to Medicaid. The Republican bill also contains language restricting agent and broker marketing and sales activities.

A compromise likely would not have major Medicare Advantage reductions, and would probably be more limited in scope than Baucus’ bill, which also includes some expansions of Medicare benefits.

Of particular importance to NAHU and its members, we share concerns about reported abuses by unscrupulous actors in our industry, and are supportive of improving oversight and accountability in Medicare private insurance sales and marketing.

However, we strongly believe the proper venue for considering such policy changes is through the public comment rule-making process already underway through CMS’s proposed regulations. NAHU is in the process of finalizing comments for submission by July 15.

If you have not already done so, please [participate in our Operation Shout](#) on this very important issue. Please impress upon your Senators that:

- CMS’s rule-making process with full and open public comment should be allowed to move forward.
- Legislation is unlikely to fully consider the broad range of dynamics and many nuances involved in selling and servicing products to America’s seniors.
- Proposed statutory changes in this area may complicate and be inconsistent with ongoing rule-making.

***Submitted By;***

***Gary Looney***

***SAAHU Legislative Liaison***



## 2008 TAHU CONVENTION EL PASO, TX



***Rusty & Lori Rice:*** SAAHU  
Trustee & Retention Chair



***Dave Antongiovanni*** with  
***Will Haff***, SAAHU President



***Lori Rice***, Retention Chair and  
***Joanna Antongiovanni***,



***SAAHU representatives*** toast a successful  
year and our TAHU Awards.



***Sandy Johnson***, Membership Chair  
with ***Linda Behrens***, Education Chair.

## TAHU Honoree's Corporation (A 501 (c) 3 Tax-Exempt Organization)

Professionals really can make a difference both to their clients and to the community. In that spirit the TAHU Honoree's Corporation was established to allow its members to honor and memorialize projects that truly make a difference.

Presently TAHU Honoree's provides college scholarships under the Ken Martin Scholarship. Ken was an active TAHU member and past President of the Houston AHU. Ken passed away from cancer in 2001. High school students from all over Texas can apply thru the local health underwriter's association for a scholarship.

Carnall's Kids makes a difference in the lives of kids with a gift of education. Named for Donna Carnall, Past TAHU and NAHU

President. Donna is from Fort Worth. Presently TAHU Honoree's are funding education for approximately 100 poverty level children in Mexico. However, for many reasons the Foundation is looking at funding educational benefits in Texas communities in the near future.

The Hollis Roberson Memorial Scholarship honors Hollis Roberson, Past President of TAHU. A scholarship goes to members of TAHU who have earned an insurance industry designation during the year. This also funds the Hollis Roberson Award, the top award to a member of TAHU.

Individual TAHU members can donate and local chapters are encouraged to participate in supporting these programs with their donation. Money can also be given UNRESTRICTED which allows the TAHU board to make contribution

decisions for special projects. I believe that SAAHU should honor San Antonio by reaching out locally but I believe that we can be part of a bigger state-wide effort to help others with scholarships, too.

I have the honor of being on the board of directors for the corporation and represent all members, not just SAAHU. You can find out more about the corporation by going to [TAHU.org](http://TAHU.org).

Submitted by:  
Ron Graves  
SAAHU Immediate Past President



**Joanna Antongiovanni**, SAAHU Trustee and her husband **Dave**, enjoy the TAHU convention.



**Jenni Whitaker**, SAAHU Trustee



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## TRUSTEE CORNER

Who are the Trustees and Trustee Emeriti of SAAHU? In this corner we will provide you with a brief glimpse. This month we are featuring Trustee Jenni Whitaker.

Jenni Whitaker has been an employee benefits broker with Wortham Insurance & Risk Management since 1995. She was named partner of the firm in 2005. Jenni provides employee benefits consulting and brokerage services for clients located in Texas and around the country. She has spoken to numerous groups on benefits plan design, healthcare data analysis and the use of technology in insurance and employee benefits. Jenni has been very involved in her community over the years, serving on several committees and boards. Industry related involvement include President of the San Antonio Association of Health Underwriters in 2001-2002, where she still serves on the board as Trustee. Jenni received several merit awards for her service from the Texas Association of Health Underwriters. In 2000, she was the recipient of SAAHU's highest honor, Underwriter of the Year. In 2005 Jenni was recognized by the Business Journal as one of the

"Rising Stars in San Antonio" as a "40 Under Forty" recipient. She received her Bachelor of Arts degree in English from Texas A&M University in 1993. Jenni has three beautiful children, Laney (17), Tanner (13) and Sam (5).

If you see Jenni be sure to say hello and thank her for her service to our association.




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***Linda Behrens:*** *Linda earns the Education Award at TAHU.*



## BOARD INSTALLATION!

Who have you put in the driver's seat of your association. Come to the luncheon June 19th, Sonterra Country Club, 11:30 registration 12:00 lunch. Meet the San Antonio Association of Health Underwriters Officers and Board Members.

## CALENDAR OF EVENTS

### **SAAHU EVENTS**

**Luncheons:** 3rd Wednesday of each month, Sonterra Country Club, San Antonio, TX .

**Board Meeting:** 2nd Friday of each month @ 8:30, UHC Office, 6200 Northwest Parkway

**Casino Night:** August 6, 2008, Dave & Buster's, San Antonio, TX

**Golf Tournament:** October 6, 2008, The Dominion Country Club, San Antonio, TX

**Symposium:** February 2009 at Oak Hills Country Club, San Antonio, TX

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### **TAHU EVENTS**

**TAHU Day at the Capital:** March 2, 2009 Sheraton Hotel, Downtown Austin, TX

**TAHU Convention:** April 30 - May 2, 2009 - Fairmont Hotel, Dallas, TX

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### **NAHU EVENTS**

**NAHU Region VI:** August 8-9 2008, Ritz-Carlton Hotel, New Orleans, LA

**NAHU Capitol Conference:** March 30-April 1, 2009 - JW Marriott Hotel, Washington, DC

**NAHU Annual Convention:** June 28-July 1, 2009 - Marriott Marquis Hotel, New York, NY

*As a member of  
SAAHU please join  
the leadership team  
in helping bring  
value added to  
membership.*

San Antonio Association Health Underwriters'  
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Vickie Lightsey  
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