



# 2025 Benefits & Medicare Summit

- ✓ Two Educational Tracks:
  - ↳ Medicare
  - ↳ Group Benefits
- ✓ Exhibiting and Sponsorship Opportunities
- ✓ Trade Show

**CLICK HERE TO  
REGISTER!**

**Contact us!**

📞 860-243-3977

🌐 [www.NABIP-CT.org](http://www.NABIP-CT.org)

✉ [info@NABIP-CT.org](mailto:info@NABIP-CT.org)



**Wednesday,  
May 14, 2025**



**9:00AM - 5:00PM**



**The Heritage Hotel**  
522 Heritage Road  
Southbury, CT 06488

# 2025 Benefits & Medicare Summit

## AGENDA



**9:00 AM**

**Morning Mingle: Registration & Coffee**

**9:30 AM**

**Welcome Remarks & NABIP-CT Annual Meeting**

**10:00 AM**

**Keynote: Maximizing the HSA Benefit for Employers and their Employees**

*Matthew Clarkin (UMB Bank)*

**11:00 AM**

**Breakout Sessions (Choose One):**

**D-SNP: Learn about New CMS Rules for SEP for Dual Eligibles**

*Medicare Breakout*

**Access Health CT Business Plus Platform:**

**Revolutionizing ICHRA Solutions for Modern Brokers**

*Group Benefits Breakout*

**12:00 PM**

**Off-The-Clock Lunch**

*No Business, Just Networking!*

**12:45 PM**

**Visit with Vendors**

**1:30 PM**

**Keynote: Emerging Compliance Trends Under the New Administration**

*Brady C. Bizarro, Esq. (The Phia Group)*

**2:30 PM**

**Keynote: From Policy to Practice: Mastering Creditable Coverage Requirements**

*Bob Brzyski (Pinnacle Financial Services), Liam Hickey (Savoy Associates) & Anthony Lividini (Savoy Associates)*

**3:30 PM**

**Sip & Showcase – Cocktail Hour with Vendors**

*Sponsored by Senior Insurance Consultants*



**4:30 PM**

**Exhibitor Breakdown**

*Thank you to our event sponsors!*





# 2025 Benefits & Medicare Summit



## Keynote Speakers



### Matthew Clarkin

#### Maximizing the HSA Benefit for Employers and their Employees

Matt Clarkin is the Vice President of Business Development in the Northeast for UMB Bank Healthcare Services Division. With a strong background in health savings accounts (HSAs), Matt has been dedicated to helping financial service and employee benefits firms navigate the HSA marketplace. In this presentation, Matt will explore the key characteristics of HSAs, emphasizing their critical role in addressing the rising cost of healthcare. He will share how employers and employees can leverage HSAs effectively and share strategies to maximize these accounts for both immediate healthcare expenses and long-term retirement planning.

### Brady C. Bizarro, Esq.

#### Emerging Compliance Trends Under the New Administration

Brady Bizarro is the Vice President of Legal Compliance & Regulatory Affairs at The Phia Group. Brady joined the company in 2016 as a healthcare attorney. He specializes in healthcare and employee benefits law, focusing on ERISA, ACA, and HIPAA compliance. In this session, Brady will discuss the latest regulatory shifts and compliance challenges facing the healthcare industry. Attendees will learn how the new administration is shaping healthcare policies, what changes may impact health benefit plans, and strategies for staying compliant in a rapidly evolving landscape.



### Panel Discussion:

#### From Policy to Practice: Mastering Creditable Coverage Requirements

Understanding creditable coverage requirements is essential for brokers navigating both group health plans and Medicare. This session bridges the gap between policy and real-world application, providing a comprehensive review of what constitutes creditable coverage under the ever changing regulations. This panel of experts will explore key definitions, common pitfalls, and best practices to ensure compliance. Attendees will walk away with the tools and confidence to guide employers and individuals through critical coverage decisions with clarity and accuracy.

#### Bob Brzyski



#### Liam Hickey



#### Anthony Lividini





# Breakout Sessions



**11:00AM - 12:00PM**  
**(Choose One)**

## Medicare Breakout

***D-SNP: Learn about New CMS Rules for SEP for Dual Eligibles***

**Panelists: Bonnie Maynard (United Healthcare),  
Traci O'Brien (Senior Insurance Consultants) & Lisa O'Hara (Aetna)**

2025 is here and with it brings changes to the way Dual Special Needs Plans (D-SNP) work. This panel discussion breakout session will explore the critical elements of Dual-Eligible Special Needs Plans (D-SNPs), focusing on the CMS 2025 Final Rule and D-SNP changes.

Join us for a discussion about what these changes are and how to be prepared. We will discuss New SEP Rules, what is a FIDE, HIDE and AIP? Why are these changes happening and the who is eligible?

## Group Benefits Breakout

***Access Health CT Business Plus Platform:  
Revolutionizing ICHRA Solutions for Modern Brokers***

**John Carbone (Access Health CT)**

Access Health CT Business Plus is redefining how brokers approach Individual Coverage Health Reimbursement Arrangements (ICHRA). This cutting-edge platform simplifies the process of offering personalized health benefits by providing businesses with greater flexibility and cost control. Brokers will be able to efficiently guide employers in leveraging ICHRA to provide high-quality, customizable healthcare options.

This session will explore key benefits and strategies that can be used to give CT business owners an option to provide health coverage that can meet both the needs of employees and the business, while transforming ICHRA solutions.

National Association of Benefits and Insurance Professionals  
Connecticut Chapter



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Connecticut Chapter





# NABIP

Shaping the *future* of healthcare

**REGISTER**  
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## 2025 Benefits & Medicare Summit

### Attendee Registration Form

**Members \$50 | Non-Members \$75**

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

Badge Name: \_\_\_\_\_

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

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

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

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

***\*\*Please choose only ONE Session Per Breakout\*\****

***Please choose which breakout  
sessions you will attend:***

**Breakout Session #1:**  
11:00 AM - 12:00 PM

☐

D-SNP: New CMS Rules  
for SEP Dual Eligibles

☐

Access Health CT  
Business Plus Platform

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**Bloomfield, CT 06002**

**Fax:**

**860-286-0787**

**Questions? Call 860-243-3977 or email [info@NABIP-CT.org](mailto:info@NABIP-CT.org)**

*Cancellations must be received by Tuesday, May 6th to qualify for a refund.*