



# HAHU HERALD

A Monthly Publication of the Houston Association of Health Underwriters

October 2013

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## November Luncheon Speaker

Honey Leveen, LUTCF, CLTC, LTCP has had her insurance license since 1988 and has specialized in LTCi since 1990. She has earned many sales and achievement awards, has published articles, been quoted in the media, sits on the AALTCi's Board of Advisors, is an "Ask the Experts" panelist for the CLTC, and blogs at [www.ltcqueen.com](http://www.ltcqueen.com).



In addition, Honey is the current editor of NAHU's LTCi-specific quarterly newsletter and is incoming chair of NAHU's LTC Advisory Committee. She's been a proud member of HAHU since 1999 and is the 2012 recipient of TAHU's Ken Martin Award for Excellence in Communication.

Honey lives in Houston with her husband, Jim, and is involved in several civic and volunteer efforts there. She enjoys LTCi outreach and is a sought after speaker for trade associations, as well as civic and professional organizations. Her passion about the need for realistic, responsible LTC planning is obvious.

Honey will be presenting **1 hour** of Continuing Education, **Gaining Insights into LTCi, How to Penetrate the LTCi Market, TAHU Course #918331**

# From the President's Desk

by Jeff Bacot



## Planning the Party

I pen this article on day 22 of the opening of the PPACA Marketplaces. I have talked to other agents, consumers and the curious about the Marketplaces, and I was most amused at the response of one consumer after I confirmed they would qualify for a fairly nice subsidy.

They said they were planning a party. I assumed it was for Halloween or a birthday and asked what they were going to serve at the party. They said a very nice cake and champagne. This was a bit confusing, so I asked what *kind* of party this was for, and they said it was for the day they actually got through the application process on [www.healthcare.gov](http://www.healthcare.gov). I laughed out loud for about a minute; it was the first good laugh I have had about the Marketplaces.

I am a tech junkie and read three types of articles every day: NAHU updates, ESPN and Technology. Lately, I'm reading more technology articles, because many of them are talking about the Marketplaces. These articles are focusing on the issues behind the problems with the Marketplace. I find it boils down to 3 things: old technology meets new technology, bad information and expertise.

The technology used to program the website is outdated by 10 years. In researching *why* it is so outdated, there is no clear answer except that the systems it uses to interface with at the IRS are that old or older. People are being asked questions to identify their identities, and the information in the government's computers is not always accurate. The other issue is spouses being shown as children, or the reverse, in the IRS systems. Finally, the expertise needed to fix Internet browser conflicts requires an intermediate to expert level knowledge. Cookies are causing issues -- the electronic kind, not the tasty kind. You have to get rid of them after an error. Thus if any type of error occurs, this means you have to almost start all over, because the cookies are the files that hold your past answers to uncompleted sections.

I think we are all in for a rough ride and that any real fix will not be possible until after March 15, when they can take the site down for a major overhaul. In the end, this \$80 million dollar Marketplace may end up being a \$500 million Marketplace. In the meantime, I suggest you all read articles from *TechCrunch* and other places focused on technology for advice on fixes.

I encourage all of you to sign up for our April CE cruise. It will be at a great time to take a break from all the stress of the next 6 months. Go to [www.hahu.org](http://www.hahu.org) to learn how to register and get the number to call to make reservations.

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## Luncheon Menu



**Mixed Green Salad**

**Atlantic Salmon Filet**

Or

**Chicken Parmigiana**

Or

**Filet Mignon Medallions (two 4-oz) a la Stone**  
(The Palm Classic with Bordelaise Sauce)

**Family Style Sides**

Mashed Potatoes

Green Beans

**Dessert**

Flourless Chocolate Cake or Key Lime Pie

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# Calendar of Events

## NOVEMBER

3 Sunday	12:01 AM	Daylight Savings Ends	With Family & Friends
11 Monday	ALL DAY	Veterans' Day	Salute a Veteran
12 Tuesday	4:00 PM	HAHU Board Meeting	5433 Westheimer
19 Tuesday	Noon	HAHU Monthly Luncheon	The Palm*
27 Tuesday	Sundown	Hanukkah (ends Dec 5)	With Family & Friends
28 Wednesday	ALL DAY	Thanksgiving Day	With Family & Friends

## DECEMBER

10 Tuesday	4:00 PM	HAHU Board Meeting	The Palm*
10 Tuesday	5:00 PM	HAHU Holiday Bash	The Palm*
25 Wednesday	ALL DAY	Christmas Day	With Family & Friends
31 Tuesday	ALL DAY	New Year's Eve	With Family & Friends

## JANUARY

1 Wednesday	ALL DAY	New Year's Day	With Family & Friends
14 Tuesday	4:00 PM	HAHU Board Meeting	5433 Westheimer
21 Tuesday	Noon	HAHU Monthly Luncheon	The Palm*
31 Friday	ALL DAY	TAHU 20th Annual Legislative Day	The Westin at the Dor

\*\*The Palm, 6100 Westheimer

## Our Luncheon Sponsor

Memorial Hermann Health Insurance Company exists to facilitate access to the highest quality health care at an affordable cost to Houston employers and residents. With Memorial Hermann Health Insurance you get access to over 5,000 total providers in our extensive network that can deliver expert care for *any* medical procedure, enabling you to receive the highest quality, most efficient, cost-effective care. We offer a broad suite of both self-funded and fully insured products. We also offer many additional employer solutions including Occupational Accident, Occupational Injury, Return to Work, Health and Wellness, Occupational Medicine and Executive Health Programs. To learn more, visit [mhhealthplan.org](http://mhhealthplan.org) or to get a quote email us at [getaquote@memorialhermann.org](mailto:getaquote@memorialhermann.org).

Mark Mattlage  
 Mark.mattlage@memorialhermann.org  
 (713) 338-6415



# Cheeseburger, Cheeseburger No Pepsi, Coke!

by Malcolm Browne



Who could forget the famous parody shown on **Saturday Night Live**, with John Belushi as a short order cook in a hamburger restaurant, taking orders? As the customer tries to order, he automatically tells them that they don't have what they came for, and he tries to switch them to something else . . . and then does it again when they change to the new suggested order.

I bring this comparison into the discussion because it reminds me of what has been happening since the exchanges opened on October 1, 2013. How many times did we hear it would be ready by October 1? By now, the word "glitch," used to describe the incessant problems with the health exchanges, is the most overused word on the news and compares to "twerking," made famous by singer Miley Cyrus.

Without the media jumping all over Congress during the governmental (vacation) shutdown, attention to the Affordable Care Act is now in the forefront of both liberal and conservative newspapers, TV, radio, etc. While it may have appeared as a failed grandstanding by Senator Cruz and the conservatives, it is now considered to be a masterful prediction to the future of Obamacare, also called "Twerkcare". Since "twerks," I mean glitches, point out the issues that we in the health industry have been pointing out all along, that health care is a complex product with too many permutations caused by individual tastes regarding how our disposable income is used. In other words, poorly trained Navigators just won't cut it when compared to the advice that trained and certified health care agents provide to the market place.

We all remember Congresswoman Pelosi stating prior to the passage of ACA that, "We have to pass the bill so you can find out what is in it." Now that Congresswoman Pelosi gets to read what has been passed in the Affordable Care Act, we can breathe a little bit as Democratic legislators are coming to grips with what our industry and the Republicans have been saying all along, that it is terrible legislation and needs to be repealed, or fixed, if it can be salvaged at all.

Continued, next page



# Cheeseburger, Cheeseburger

Continued from page 6

With both sides of the aisle jumping on the Congressional investigation bandwagon faster than you can say “Bengazi,” there appears to be a move to put things on hold due to the bombardment coming from what is considered to be liberal press. Jeff Judson writes in the San Antonio *Express News* on Sunday, October 1, “Now that the Affordable Care Act has gone into effect, the debate will shift from promises and theories to what consumers actually experience. As we are seeing, the first reaction appears to be bipartisan sticker shock.”

Today, October 24, Congressional hearings were held as both parties were grilling the architects of the website to find out what went wrong and who knew what and when. The NAHU newswire reports that the State based exchanges have done better than the federal with over 100,000 applications as of October 15. Doesn't sound that positive to me. NAHU quotes the Associated Press having written that Senator Lisa Murkowski had said that she was told that *no one* was able to enroll in the Alaska exchange.

The Houston *Chronicle* writes in their newspaper on Wednesday, October 23, 2013, “Insurance website creators saw red flags.” Really????

The Washington *Post* reported Wednesday night that the “Obama Administration confirmed that it will give Americans who buy health insurance through new online marketplaces an extra six weeks to obtain coverage before they risk a penalty. The revised guidelines means that those who buy coverage through the exchange will have until March 31 to sign up for a plan.”

And if that deadline isn't met for fixing the exchange, I suppose the Obama Administration will be “twerky” in front of the Press to the tune of the hit song, “Blurred Lines” by Robin Thicke. While that is happening, consumers will be confronted with, “Cheeseburger-Cheeseburger, No Pepsi - Coke” as the revisions to the online subscription service is rewritten daily with no end in sight.

If John Belushi were alive today, he would have a lot of fun on **Saturday Night Live**, with what is happening with the Affordable Care Act Exchanges!

## October Luncheon Photos



Our first luncheon at The Palm Restaurant on Westheimer. We had a great crowd, a great speaker and great food. Join us for future luncheons and

the Holiday Bash at The Palm!!





## More Photos

Our speaker,  
Mike Smith,  
Membership  
Chair Naph  
Carlson and Leg  
Chair Malcolm  
Browne



Our luncheon sponsors from HR & P, (l to r) Mike Moore, Lea Ann Gibson, Kevin Alexander and Kevin Roblyer.



# Young Professionals Event

HAHU held its first Young Professionals event on November 5 at the Kung Fu Saloon. The event was sponsored by Memorial Hermann Health Insurance Company. Watch for word on the next event after the first of the year.

Below,  
Crystal Hoff-  
man and  
Jamie Jones



Above, (l to r) , Brady Lenz, Barbara Garcia and her guest, and Brettne Frewin.



Above, Garrin Raymond and Jamie Jones

Event Coordinators Candice Kersten, Crystal Hoffman, Naphtali Carlson and Michael Ledgerwood

# Member Spotlight

We currently have a Member Spotlight section on the HAHU website that highlights specific individuals. If you would like to recommend someone for the Member Spotlight, please let us know!

Attention Members: Please log in and update your member profile with a biography and photo in order to be on the spotlight!



# HAHU Membership Update

Current Membership: 423

HAHU would like to take this opportunity to welcome our New Members and their Sponsors:

Lisa Minor – Sponsored by NAHU

ATTENTION MEMBERS:  
Recruit 4 members between now and July 30, 2014 and choose between One Year of NAHU Dues or a \$250 American Express Gift Card

Happy Anniversary!  
  
Month: November

Attention Young Agents:  
If you or anyone that you know is interested in participating in a HAHU Young Agents Organization, please contact Naph!

First Name	Last Name	Company	First Name	Last Name	Company
Valerie	Bagwell	Entrust	Laura	Milliorn	BenefitMall TX
Mary	Collins	Collins Benefits Solutions	Darin	Reeser	Allstate Benefits
Elvert	DelaRosa	Innovative Benefits and Services	Tina	Riffle	SUIA
Kathy	Garza	Memorial Financial Services	Stephanie	Rogers	MHealth, Inc
Steven	Hoffman	Steve Hoffman Insurance	Dale	Sands	Dale Sands & Associates
James	Hubbard	Benefit Concepts	Jack	Schubert	Schubert Insurance Agency
Kathy	Kilpatrick	Kilpatrick Companies	Jim	Smith	The Compliance Office
Jackie	Kilpatrick	Kilpatrick Companies, Ltd.	Paul	Stern	Stern Financial Services
Cooper	Kinney	Zurich	Rod	Stevenson	The Benefits Advisors
Susan	Lee	Innovative Benefits Solutions	Renee	Trask	BenefitMall TX
Jerry	Levy	LTC Financial Partners	Patti	Tuma	Benefits Unlimited, Inc.
Shannon	Marks	Insurance Alliance	Kimberly	Whaley	Core Benefits
Martin	Matras		Clint	Wilson	Wilson Consulting Group
John	McCabe	Insperty	Laura	Wortham	The Hartford
Travis	Middleton	TradeMark Insurance Agency			

For any membership related inquiries please contact membership chair Naphtali Carlson  
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Business Card	\$ 325.00
1/4 page	650.00
1/3 page	800.00
1/2 page	1,100.00
Full page	2,000.00
One-time insert	175.00

For more information:

Kathi Sandler, Executive Director  
[ksandler@hahu.org](mailto:ksandler@hahu.org) / 713.520.5720

#### OFFICIAL NOTICE:

Neither the Houston Association of Health Underwriters (HAHU), nor its Officers, nor Board of Directors endorses any advertisement which appears in this bulletin; however, these parties appreciate the support of any advertiser. Any references in this publication which may be subject to legal interpretation (i.e., state or federal laws, state licensing requirements for agents, approved continuing education courses for maintaining an agent's license) are not to be construed as fact and are not endorsed as such by the HAHU, its Officers, or the Board of Directors. Each reader is responsible for verifying these references through the appropriate government agency licensing authority or other source.

The HAHU Board further encourages an open, healthy debate of industry issues through publication of the articles herein. This does not necessarily constitute an endorsement of positions stated.

## Holiday Bash December 10

All HAHU members, come celebrate the season with your friends at the annual Holiday Bash on December 10<sup>th</sup> starting at 5 pm. Come check out the new venue, The Palm restaurant on Westheimer. There will be food, drinks and lots of prizes. Bring a spouse or date and share in the cheer the holidays bring. The party is FREE to all HAHU members.

HAHU BUDGET 2013-2014			
		EXPENSES	
		AWARDS SUBMISSIONS	\$300.00
		AWARDS BANQUET	\$1,000.00
REVENUES		CREDIT CARD SERVICE FEES	\$3,000.00
ASSOCIATION DUES	\$23,000.00	CHARITABLE DONATIONS	\$5,000.00
AWARDS BANQUET	\$3,500.00	EDUCATION	\$9,000.00
BOWLING	\$5,000.00	BOWLING	\$4,000.00
CHARITABLE DONATIONS	\$300.00	GENERAL, ADMIN & OVERHEAD	\$25,000.00
EDUCATION	\$13,000.00	FUTURE EXPENSE SAVINGS	\$600.00
GOLF TOURNAMENT	\$20,000.00	GOLF TOURNAMENT	\$15,000.00
HOLIDAY BASH	\$5,000.00	HOLIDAY BASH	\$5,000.00
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LEG TRAVEL FUND	\$1,400.00	LUNCH SPONSOR	\$300.00
LUNCH SPONSOR	\$2,800.00	LUNCHEONS	\$23,000.00
LUNCHEONS	\$25,000.00	MEDIA	\$4,300.00
MEDIA	\$6,000.00	MEMBERSHIP	\$800.00
NEWSLETTER	\$500.00	NEWSLETTER	\$500.00
SYMPOSIUM	\$30,000.00	SECRETARY	\$50.00
TECHNOLOGY	\$3,000.00	SPEAKERS	\$750.00
Total	\$139,600.00	SYMPOSIUM	\$15,000.00
		TECHNOLOGY	\$3,000.00
		TRAVEL	\$20,000.00
		Total	\$139,600.00
		Revenue minus Expenses	\$0.00



# Relax after the early renewals, Medicare supplement enrollments, etc. with a C(E) Cruise!!

HAHU is excited to offer a CE Cruise in 2014! Set sail with your fellow HAHU members as we cruise to Cozumel on the Carnival Triumph! The cruise will depart from Galveston on April 3, 2014 and return to Galveston on April 7, 2014. During our days at sea HAHU will offer a minimum of 5 hours of CE (courses TBA). You can book your cruise through HAHU for no additional cost, or book through your own travel agent and pay a \$50 CE fee to HAHU (please register to pay online [www.hahu.org](http://www.hahu.org)). To book your cruise with HAHU please contact Marian Hoffman or Crystal Hoffman at 281-313-6565. Questions can be emailed to [marianhoffman@hotmail.com](mailto:marianhoffman@hotmail.com) or [crystal@hoffmanig.com](mailto:crystal@hoffmanig.com). Please see the cruise flier for pricing information. If you would like to sponsor, or donate items for passenger goodie bags, please contact Crystal Hoffman at 281-491-6565 or [crystal@hoffmanig.com](mailto:crystal@hoffmanig.com).



## CE CRUISE

APRIL 3, 2014 – APRIL 7, 2014

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8B - Balcony	\$576.06
6C – Ocean view	\$481.06
6B - Ocean view	\$476.06
4F – Inside	\$460.06
4D - Inside	\$436.06

A deposit will be due at the time of booking. The deposit amount is determined by the cabin category and date of booking. Reservations booked after December 15, 2013 will be charged a \$25 late fee. You may cancel your cabin any time prior to February 3, 2014 and receive a full refund. Refunds will not be given after February 3, 2014.

<b>Insurance Rates:</b>	<b>\$ 0 - \$399</b>	<b>\$49 per person</b>
<i>insurance is optional</i>	<b>\$ 400 - \$500</b>	<b>\$65 per person</b>
<i>&amp; can be purchased elsewhere, if you choose</i>	<b>\$ 501 - \$600</b>	<b>\$79 per person</b>

To book your reservation with HAHU, contact Marian Hoffman or Crystal Hoffman.  
 PH: (281) 313-6565 [marianhoffman@hotmail.com](mailto:marianhoffman@hotmail.com) or [crystal@hoffmanig.com](mailto:crystal@hoffmanig.com)



# The President's 2013 Triple Crown Program

NAHU created the President's Triple Crown Program to recognize those members whose individual contributions to NAHU help advance the association's mission. Like baseball's Triple Crown, it recognizes accomplishment in three key areas. However, while baseball's Triple Crown hasn't been won since 1967, NAHU's Triple Crown can be won every year by hundreds of our members.

## Criteria

To qualify for the Triple Crown, within the calendar year, a member must:

- HUPAC:** Participate in the \$10 x 12 draft program or contribute \$150 total
- Membership:** Recruit at least two new members
- Advocacy:** Use Operation Shout to send at least three messages

One, two, three—it's that simple!

While members have the entire year to complete the requirements, winners will be announced quarterly. Once a member achieves Triple Crown, their name will appear only once on the specific quarterly qualifiers report in the quarter in which the recognition was obtained. Once earned, the member has qualified for that calendar year.

## Recognition

Members who meet these criteria will be recognized in a variety of ways, including a unique "President's Triple Crown" lapel pin and recognition in *HIU* magazine, and on NAHU's website.

## The Triple Crown Club

Recognizes members who have achieved the Triple Crown recognition for 3 consecutive years or more. Qualifiers will be determined and recognized at NAHU's Annual Convention.

## Criteria

- Emerald Level** — Received the Triple Crown award for 3 consecutive years
- Ruby Level** — Received the Triple Crown award for 5 consecutive years
- Diamond Level** — Received the Triple Crown award for 10+ consecutive years

## Recognition

Members who qualify for Presidents Club will be recognized with special ribbons and certificates at NAHU's Annual Convention, recognition in *HIU*, and on NAHU's website.

**Claim the Crown!**

Address your questions to: [Triplecrown@nahu.org](mailto:Triplecrown@nahu.org)





## Houston Association of Health Underwriters Board of Directors and Committees

2013—2014



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Up to two hours may be claimed for reviewing educational materials. Up to four hours may be claimed for attendance at presentations. The content must be insurance or insurance-related.

**A maximum of four hours total may be claimed once per licensing cycle. The hours claimed, no matter how earned, count toward the licensee's required Continuing Education as Self-Study credit.**

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Holder of National Professional Designation: \_\_\_\_\_

Publications reviewed or educational presentations attended (Please be specific. May continue on another page)	Reviewing/Attending Hours	Date
---	------------------------------	------

\_\_\_\_\_  
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Signature of License Holder Date

