



2025 NABIP Nebraska Medicare Summit

Agenda (all times listed are central time)

Thursday, July 31, 2025

8:00 AM – 8:45 AM	Breakfast & Networking
9:00 AM – 10:00 AM	Nebraska State Budget & Tax Policy – Impacts & Insight
10:00 AM – 11:00 AM	The Top Ten Mistakes Made in Estate Planning
11:00 AM – 12:00 PM	Updates from the Nebraska Department of Insurance
12:00 PM – 12:30 PM	Lunch & Networking
12:30 PM – 1:30 PM	Medicare Market Trends 2025
1:30 PM – 2:30 PM	Long-Term Care and Home Health Care: Ensuring Quality of Life
2:30 PM – 3:00 PM	Break & Networking
3:00 PM – 4:00 PM	Why Medicare Advantage?
4:00 PM – 5:00 PM	Practical Tools + Real Threats for Independent Insurance Agencies
5:00 PM	Happy Hour & Entertainment

Friday, August 1, 2025

8:00 AM – 8:30 AM	Breakfast & Networking
8:30 AM – 9:30 AM	Social Security: Top Ten Misconceptions
9:30 AM – 10:30 AM	Providing Contracting for Medicare Services
10:30 AM – 11:00 AM	Break & Networking
11:00 AM – 12:00 PM	Provider-Led Medicare Advantage: Delivering Coordinated, Value-Based Senior Care in Nebraska
12:00 PM – 1:00 PM	Protecting Your Client & Block of Business with Cross Enrolling!
1:00 PM	Conference Concludes

PROGRAM OVERVIEW

Nebraska State Budget & Tax Policy – Impacts & Insight

This session will equip insurance and benefits professionals with a practical understanding of Nebraska’s budget priorities and tax policy—highlighting how these factors shape access to care, influence Medicare delivery, and affect day-to-day business operations within the healthcare and insurance industries. Attendees will gain valuable context to better serve clients and advocate within the evolving policy landscape.

The Top Ten Mistakes Made in Estate Planning

People make estate planning errors every day. This program will discuss the top ten estate planning mistakes most clients don’t think about and how to help them avoid these pitfalls. Upon completing this session, attendees should be able to:

- Understand the most common and detrimental mistakes that are made when putting an estate plan together
- Gain knowledge on how to avoid these mistakes and help clients develop a secure and well-rounded estate plan
- Develop an action plan for working with clients through the estate planning process

Updates from the Nebraska Department of Insurance

This session will provide participants with timely updates from the Nebraska Department of Insurance, focusing on recent developments in Medicare, Medicare marketing guidelines, and new Nebraska insurance-related statutes. The session will offer practical insights for licensed professionals, those pursuing licensure, and individuals who support clients or professionals in the insurance and benefits industry.

Medicare Market Trends 2025

This one-hour continuing education course offers licensed agents an in-depth look at the evolving Medicare landscape, highlighting critical trends, regulatory updates, and market insights for the upcoming year. Designed to keep professionals informed and competitive, this session explores current industry dynamics, legislative impacts, and future growth opportunities within the Medicare space.

Long-Term Care and Home Health Care: Ensuring Quality of Life

This one-hour continuing education session provides insurance and benefits professionals with a comprehensive overview of long-term care (LTC) and home health care (HHC), their impact on quality of life, and how final expense insurance plays a critical role in end-of-life planning. The session explores current challenges, innovations, and policy developments affecting care delivery, while also examining insurance tools that support aging individuals and their caregivers. Participants will gain valuable insights to better assist clients in preparing for both care needs and final expenses.

Why Medicare Advantage?

A detailed look at Medicare Advantage and why it can be a viable option for Medicare beneficiaries when compared to original Medicare with a Medicare Supplement and Prescription Drug Plan. While reviewing how Medicare Advantage functions for the beneficiary, false and misleading statements regarding Medicare Advantage commonly heard from media outlets the healthcare community will be addressed to set the record straight.

Practical Tools + Real Threats for Independent Insurance Agencies

Artificial Intelligence is transforming how independent insurance agencies operate—offering tools to automate operations, drive client engagement, and scale faster than ever. But with every AI innovation comes a new set of cybersecurity threats, compliance risks, and ethical questions that no agency can afford to ignore.

This course explores both the promise and the peril of AI in your agency. You'll gain insight into practical AI tools you can implement today—and discover how cybercriminals are using the same technology against businesses like yours.

Led by Daniel Metcalf, cybersecurity expert and co-founder of CyberFin, this session is packed with real-world examples, live demos, and business-ready strategies. You'll leave with clear steps to stay compliant, secure, and competitive.

Social Security: Top Ten Misconceptions

This seminar is designed to provide meaningful information and training to enable financial advisors and producers to learn about the Social Security OASDI program history, current retirement benefit demographics, misconceptions about the program and

planning options that are available for clients who are married, widowed, divorced or single.

Providing Contracting for Medicare Services

This session offers an inside look at how provider contracting is structured and maintained for Medicare products. Attendees will gain a deeper understanding of how networks are built, what factors influence contracting across different Medicare lines of business, and how payers can address common provider concerns. Drawing from real-world experience, this session explores contracting dynamics, challenges in urban and rural markets, and strategies to improve provider relationships and reduce friction within the healthcare delivery system.

Provider-Led Medicare Advantage: Delivering Coordinated, Value-Based Senior Care in Nebraska

This course explores how a provider-led Medicare Advantage (MA) model—with strong physician governance and local health system alignment—can deliver more coordinated, efficient, and personalized senior care. Insurance professionals will gain insight into how clinical leadership directly shapes plan design, streamlines operations, and improves member experience. The course also introduces the upcoming **Bryan + Sanford Medicare Advantage Plan**, set to launch in 2026, and highlights its commitment to access, affordability, and high-quality care across rural and urban Nebraska.

Protecting Your Client & Block of Business with Cross Enrolling!

This session explores the strategy and value of cross enrolling clients in additional coverage beyond a stand-alone Medicare Advantage (MA) plan. Participants will learn how identifying and addressing gaps in coverage—such as hospital indemnity, dental/vision/hearing, and cancer plans—not only helps protect clients from unexpected out-of-pocket costs, but also strengthens long-term client relationships and retention. This course provides practical tools and insights to safeguard both your clients' well-being and your block of business in a competitive marketplace.

FEATURED SPEAKERS

Nebraska State Budget & Tax Policy – Impacts & Insight -- [Korby Gilbertson](#), Partner, *Radcliffe Gilbertson & Brady Law Firm*

Korby Gilbertson is a proud Lincoln native. She attended Lincoln High and the University of Nebraska where she received a bachelor's degree in marketing and business education in 1992 and a Juris Doctorate in 1996.

Ms. Gilbertson is a partner with the lobbying and governmental relations law firm of Radcliffe Gilbertson & Brady where her firm provides full-service lobbying and governmental relations services to more than 40 clients. Issues the firm is regularly involved with include insurance, taxation, real estate, physical, mental and behavioral healthcare, telecommunications, education, and First Amendment issues including open meetings and public records.

Korby currently serves on the board of directors for Nebraska Wildlife Crimestoppers. She is a past board member and board chair of the Lincoln Medical Education Partnership as well as HopeSpoke, The Nebraska Club, and the Lincoln YWCA.

Korby and her husband Mark Munger live just outside of Lincoln. Their blended family includes one son, two daughters, four grandchildren, two cats and about 20,000 honeybees. In her free time, Korby enjoys gardening, cooking, canning, baking, and traveling.

The Top Ten Mistakes Made in Estate Planning -- [Andrew M. Loudon](#), Esq. Attorney, *Ball, Loudon, Ebert and Brostrom Law Firm*

Mr. Loudon is a trusts and estates attorney. He specializes in wills, trusts, business succession planning, federal estate tax planning, non-probate estate administration, probate proceedings, powers of attorney and living wills.

Updates from the Nebraska Department of Insurance -- [Martin Swanson](#), Deputy Director & General Counsel, *Nebraska Department of Insurance*

Martin Swanson is the Deputy Director and General Counsel of the Nebraska Department of Insurance. Previously, he served as Health Policy Counsel with the Department. He had advised the Governor of Nebraska, testified in front of legislative committees and

worked with members of Congress and the federal government on health insurance matters.

He has been with the Department for over twenty years and has participated on numerous working groups, task forces and other committees at the National Association of Insurance Commissioners. Currently, he chairs the Improper Marketing of Health Plans working group at the NAIC.

Previously, Martin served as an Assistant Attorney General with the State of Nebraska, a Deputy County Attorney in Platte County, Nebraska and taught prosecutors at the New York Prosecutor Training Institute in Albany, NY. He also was the first Nebraskan selected by the National Association of Attorneys General to serve as a Supreme Court Fellow at the U.S. Supreme Court.

Martin graduated from Creighton University in 1992 and from Creighton University School of Law in 1995.

**Updates from the Nebraska Department of Insurance -- [Jonathan Burlison](#),
Administrator, *Nebraska Department of Insurance***

Jonathan Burlison serves as administrator for the Nebraska SHIP & SMP (State Health Insurance Assistance Program & Senior Medicare Patrol), a division of the Nebraska Department of Insurance (DOI). Jonathan has served the State of Nebraska for 10 years, earning state recognition for outstanding service and excellence in 2015 and 2016 for his work coordinating state fund raising campaigns for the DOI. Jonathan joined the Nebraska SHIP & SMP in 2017, as the program's outreach coordinator and regional representative, coordinating volunteer activities within the southeast portion of Nebraska. In May 2022, Jonathan accepted the role of program administrator and finds great fulfillment in this role as he continues growing the program, locally and nationally, also serving as a member of the National SHIP Steering Committee. Under Jonathan's leadership the Nebraska SHIP & SMP has enjoyed success in serving the State while meeting the program's objective to provide local, unbiased, education and counseling so Nebraskans with Medicare may make informed health care decisions while learning how to protect their Medicare benefits from potential fraud, error, or abuse.

Medicare Market Trends 2025 -- [Jeff Sullivan](#), Vice President of Medicare Solutions, Senior Market Sales

As Vice President of Medicare Solutions for Senior Market Sales, Jeff is responsible for marketing and distributing many of the top national Medicare Advantage, Dental and Medicare Supplement carriers to an independent agent field force with a focus on working with Call Centers. With more than a decade of experience in the insurance industry, Jeff has the knowledge and experience it takes to help agents take their business to the next level as well as guiding them through the world of lead generation strategies and compliance.

Jeff lives in Elkhorn, NE with his wife and three children. He enjoys traveling with his family as well as playing the occasional round of golf when he's not attending kid's dance recitals, ball games and gymnastics meets.

Long-Term Care and Home Health Care: Ensuring Quality of Life -- [Todd Brauch](#), Senior Insurance Marketing

Todd Brauch has over 36 years of experience in the insurance industry assisting agents with life, annuity and health. He has his FLMI and ACS designation also Life, Health and Annuity License. Given his wealth of experience and insurance knowledge he is an asset to the Senior Insurance Marketing team.

Todd is an avid member of several organizations and loves spending time with his wife and two sons – as well as time on the family farm.

Why Medicare Advantage? -- [Adam Welch](#), Manager, Government Program Sales, Blue Cross Blue Shield of Nebraska

Adam is the manager of Government Program sales at Blue Cross Blue Shield of Nebraska. He has solid experience in the insurance industry, working previously as a Market Sales Manager with United Healthcare and the Life Marketing Director at Insurance Agency Marketing.

Education:

BA, Business Administration & Health Promotion Management, Hastings College, Hastings, NE

Certified Annuity Specialist, Institute of Business and Finance

Practical Tools + Real Threats for Independent Insurance Agencies -- [Daniel Metcalf](#), Managing Partner, *CyberFin*

Daniel Metcalf is a seasoned speaker, cybersecurity expert, AI enthusiast and curling aficionado. Over the past 15 years, he's helped build, protect, and grow small and mid-sized businesses—sometimes as a founder, sometimes as a partner, and always as a doer. Today, he splits time between speaking, advising, and building systems that help leaders simplify complexity, stay secure, and scale with confidence. His goal today is to help your agency use AI with confidence—leveraging it to become more human, more efficient, and more connected, while staying fully protected against the cybersecurity risks it can introduce.

Social Security: Top Ten Misconceptions -- [Michelle Owens](#), JD, CLU, ChFC, CEBS - Manager, Advanced Markets, *Mutual of Omaha Insurance Company*

Michelle focuses on training and case consultation with advisors on topics including premium finance, Social Security, retirement income, estate and business planning. Michelle has been with Mutual of Omaha in the Advanced Markets area since 2013. Prior to that she worked in the banking industry at Mutual of Omaha Bank and Security National Bank. She earned her Law Degree from the University of Nebraska.

Providing Contracting for Medicare Services -- [Adam Steffen](#), Director, Provider Contracting and Market Engagement, *Medica*

Adam Steffen is a seasoned health care finance and operations leader with over 25 years of experience spanning compliance audits, provider network development, value-based care, and government health programs. He currently serves as the Director of Provider Contracting and Market Engagement at Medica Health Plans in Omaha, where he leads efforts to ensure network adequacy and value-based contract implementation across multiple product lines. Adam's career includes key roles at Nebraska Health Network, Bland & Associates, AmeriHealth Caritas Nebraska, and Blue Cross Blue Shield of Nebraska, where he has consistently driven strategic initiatives in provider engagement, quality improvement, and health care access.

Provider-Led Medicare Advantage: Delivering Coordinated, Value-Based Senior Care in Nebraska -- [Ben Sparks](#), President, *Bryan Health Connect*

Ben Sparks, MBA is President of Bryan Health Connect, a Nebraska-based physician-hospital organization (PHO) of more than 2,000 providers across the state. He also serves as the President of BESHP inc. a joint venture between Bryan Enterprises and Sanford Health Plan created to offer Medicare Advantage plans in Nebraska. Ben joined Bryan Health in 2021, joining Bryan Health Connect in 2024. Ben works in partnership with providers, payors, and employers to deliver innovative solutions to groups and individuals across the state. Ben also serves as president of Bryan Health Connect, ACO, which is a partnership of providers focused on delivering value-based cost and quality improvement to over 90,000 Nebraskans.

[Nate Ovenden](#), Senior Director of Growth, *Stanford Health Plan*

Nate Ovenden, MBA is the Senior Director of Growth at Sanford Health Plan, where he leads strategic initiatives for Medicare Advantage Plans across North Dakota, South Dakota, Iowa, and Minnesota. Since helping to launch Sanford's Medicare Advantage Plans in January 2022, Nate has been instrumental in their growth and performance. He also oversees the organization's Institutional Special Needs Plan (I-SNP), which has been serving members in North Dakota, South Dakota, and Nebraska since 2018. Before joining Sanford Health Plan, Nate spent a decade on the provider side with the Good Samaritan Society as Director of Medicare and Managed Care. There, he played a key role in implementing the Patient Driven Payment Model (PDPM) and contributed to national policy discussions as a member of the American Health Care Association Reimbursement Cabinet, regularly engaging with CMS to enhance skilled nursing facility reimbursement.

Jennie Nickles, Senior Director of Sales & Retention, *Sanford Health Plan*

Jennie Nickles is the Senior Director of Sales & Retention at Sanford Health Plan, where she leads strategic growth and retention efforts across all product lines distributed through the broker channel. With oversight spanning the Dakotas, Minnesota, Iowa, and Wisconsin, Jennie plays a key role in driving market expansion and delivering a high-performing broker experience. With over 16 years of experience at Sanford Health Plan, she has been instrumental in supporting significant membership growth, launching new product innovations, and building a strong, scalable broker distribution model. Her deep knowledge of the health insurance landscape and her collaborative approach have positioned her as a trusted leader in the industry and a valuable partner to brokers and clients alike.

Dr. Brandon Webb, Chief Medical Officer, *OneHealth Nebraska ACO*

Brandon Webb, MD serves as Chief Medical Officer for OneHealth Nebraska ACO. In this role, Brandon supports 29 independent member primary care clinics in the Lincoln, Nebraska area to achieve quality and cost metrics over multiple value-based contracts including MSSP, commercial ACO, and MA plans. He also assists with policy and negotiations between OneHealth Nebraska and payers, health systems, and other physician leaders. Brandon's background includes 26 years as a practicing family physician and owner of his multi-site independent practice, Primary Care Partners. Brandon is the president and senior partner of Primary Care Partners and serves as their lead physician for value care. He is a fellow of the American Board of Family Medicine and serves on the Nebraska Medical Association Board of Directors. He was also appointed by the governor to the Nebraska Primary Care Investment Council in 2024. Brandon is a proud graduate of Baylor University in Waco, TX and McGovern Medical School in Houston, TX.

Dr. Jessica Heckman, Vice President of Medical Affairs, *Bryan Health Connect*

Jessica Heckman, MD, serves as the Vice President of Medical Affairs for Bryan Health Connect and has a key role in building strong and collaborative relationships with providers, payers and large, self-funded employers. Dr. Heckman champions physician and advanced care practitioner alignment strategies to support the BHC annual goals and objectives in the value-based health care environment.

Protecting Your Client & Block of Business with Cross Enrolling! -- Michael Gende, *Guarantee Trust Life Insurance*

Michael Gende has been with GTL, Guarantee Trust Life Insurance for 9 years and has devoted his life to researching and practicing Sales, Management and Motivation!