THE 2026 Calendar

FOR EXPERTS. **BY EXPERTS.**

ocozzio | Your Self-Funded Marketing Guide

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A Note from Ocozzio

Every year in self-funding, the industry raises the bar and so do we. As B2B healthcare marketing experts, our mission is to equip you with practical tools designed by experts, for experts. The Ocozzio Self-Funded Industry Calendar isn't just a roadmap; it's your guide to field-tested strategies and insights that help you solve today's self-funded marketing challenges.

Last year's calendar was embraced by thousands of people, industry veterans and newcomers alike who used it to stay on track and ahead of trends. Your enthusiasm and feedback directly shaped this 2026 edition, making it even more relevant and actionable for self-funding leaders.

What's new this year?

- **Hit the Ground Running in Q1:** Practical ways to help brokers re-engage employer groups and nurture clients with fresh self-funded insights.
- **AI in Self-Funded Marketing:** Smart ways to use AI for organizing data, automating outreach and accelerating research without compromising brand humanity.
- **SEO 🤝 AEO:** How to optimize your digital presence so you're always discoverable and trusted, wherever your audience is looking.
- **Say More with Less:** Quick tips for concise, high-impact communications that cut through the noise.
- **Analytics Demystified:** Simple ways to use analytics to drive smarter, more strategic decisions.

This calendar is more than dates and deadlines. It's a living resource shaped by your feedback and the industry's best minds. If you're looking for a marketing partner who knows self-funding inside and out, let's mark a date to connect. **Here's to another year of setting the standard, together.**

Annie Smith
Chief Executive Officer

Follow Annie on LinkedIn

Curious to see what we can do for your business? Click to see how we can help you grow smarter, faster.

January

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **Post 1/1 Chaos** – The industry has been working feverishly towards 1/1. Use this time to continue planning for the year! Don’t risk falling behind on campaigns that could drive Q1 and Q2 growth.

2. **Make Adjustments** – Reflect on how to use last year’s wins to deepen relationships and drive revenue, while analyzing losses for lessons that can fuel smarter strategies.

3. **HCAA Executive Forum** – A premier industry event, and a great opportunity to get in front of TPAs, is next month. Have you scheduled your key meetings and prepared your pitch?

Shelby Wise
VP, Accounts

ADVICE THAT DOESN’T MISS

Balance Strategy with Daily Execution

“Long-term strategy sets the course, but consistent day-to-day execution is what keeps marketing efforts moving forward. Prioritize both: the big-picture planning that defines your brand and the smaller actions that keep your audience engaged and informed. Success isn’t about choosing one over the other, it’s about making sure they work in sync.”

HERE’S HOW TO PUT IT INTO PRACTICE

Shelby’s Marketing Tip

Break annual goals into quarterly strategies, then define weekly deliverables that support them. Use a shared content calendar with live links, owners and deadlines. Set up monthly syncs with marketing and sales to gut-check priorities. Use task boards to track and adjust as campaigns evolve.

→ **Why it Matters:** Strategy without structure fades fast. Turning high-level plans into daily action ensures your brand moves with intention.

Calendar Key

- Important Industry or Legislation Date
- Major Industry Conference
- National Event
- Federal Holiday
- Other Holiday

SUN	MON	TUES	WED	THUR	FRI	SAT
28	29	30	31	01 New Year's Day; 1/1 Renewals	02	03
04	05	06	07	08	9	10
11	12 National Pharmacist Day	13	14	15	16	17
18	19 MLK Jr. Day	20 HBCE – Health Benefits Conference & Expo (Ponte Vedra Beach, FL)	21 HBCE – Health Benefits Conference & Expo (Ponte Vedra Beach, FL)	22 HBCE – Health Benefits Conference & Expo (Ponte Vedra Beach, FL)	23	24
25 IBEW–NECA Employee Benefits Conference (Naples, FL)	26 IBEW–NECA Employee Benefits Conference (Naples, FL)	27 IBEW–NECA Employee Benefits Conference (Naples, FL)	28 IBEW–NECA Employee Benefits Conference (Naples, FL)	29	30	31

January

Racing Into 2026: Self-Funded Market Readiness Checklist

Your self-funded strategy needs more than horsepower. It needs the right driver.

(Yes, we're back at the starting line with a racing metaphor. *Because in this market, speed isn't optional.*)

1 Warm Up the Engine

- Touch base with your most engaged clients and partners.
- Review 2025 successes and roadblocks by identifying where traction was gained and lost.
- Confirm 1/1 onboarding, enrollment and implementation are running smoothly.

2 Refuel Your Messaging

- Update positioning with fresh market insights and regulatory changes.
- Share success stories or metric-driven results relevant to your audiences.
- Make messaging solution-oriented, focus on outcomes for brokers and clients.

3

Tune Up Your Systems

- Clean and segment contact lists: clients, prospects, partners, etc.
- Load Q1 resources, toolkits and campaigns into your CRM.
- Audit your digital ecosystem for accuracy and relevance.

4

Map the Course

- Define goals for retention, new business and partnerships.
- Coordinate calendars across sales, marketing, operations and service teams.
- Lock in Q1 and Q2 events, conferences and sponsorships.

5

Take the Lead

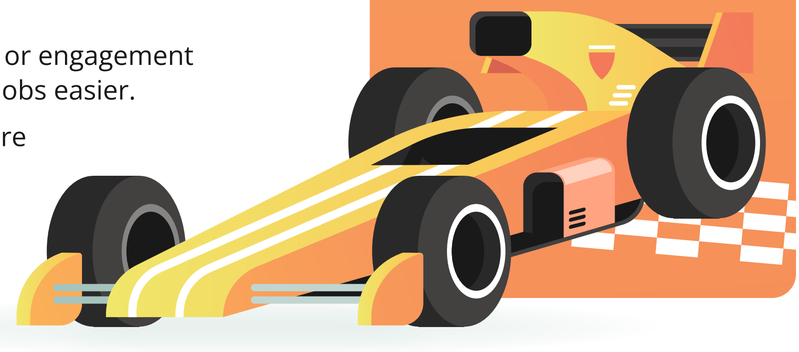
- Provide co-brandable or white-label materials to brokers and clients.
- Share ready-to-use education or engagement campaigns that make clients' jobs easier.
- Examine where competitors are falling short to see where you can gain an edge.

The difference between a pit stop and a breakdown?

Preparation.

BONUS TIP

Impactful benefits messaging often lives at the intersection of CFO priorities and HR priorities. Frame your solutions to deliver tangible savings and financial predictability while protecting and enhancing the member experience. The right balance speaks to decision-makers and accelerates buy-in.



February

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **Prioritize Outreach** – Now that the post-1/1 chaos has subsided, don't wait to re-engage your prospects. When is your first outreach scheduled and what value are you delivering?

2. **SIIA Events** – SIIA is hosting two smaller events this month, each focused on key industry topics. If you can, try to attend and start prepping now for next month's Spring Forum.

3. **Value Over Volume** – Focus on adding value, especially on LinkedIn and in email. The quality of what you share and how you say it matters far more than how often you post.

Taylor Stocker
Senior Digital Strategist

ADVICE THAT DOESN'T MISS

Be an Active Participant on LinkedIn

"LinkedIn isn't just for company announcements. The algorithm favors engagement like comments, shares and real conversations. The more you interact, the more visibility you earn. It's not about posting more, it's about being present on the LinkedIn feed where and when it matters."

HERE'S HOW TO PUT IT INTO PRACTICE

Taylor's Marketing Tip

Treat LinkedIn like a conversation, not a bulletin board. Set aside 10 minutes a day to engage with content, comment on trending industry topics with your point of view and reshare client success stories with clear takeaways. Tag connections to strategically bring others into the conversation and build authentic visibility.

- **Why it Matters:** Showing up with thoughtful engagement builds familiarity and trust before the first outreach ever happens. That's what moves a brand from being seen to being remembered.

Start Your Training

Calendar Key

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- Federal Holiday
- Other Holiday

SUN	MON	TUES	WED	THUR	FRI	SAT
01	02 Groundhog Day	03 In·Value·Able Conference & Expo (Cleveland, OH)	04 In·Value·Able Conference & Expo (Cleveland, OH)	05	06	07
08 Super Bowl	09	10	11	12 NLMC – National Labor & Management Conference (Hollywood, FL)	13 NLMC – National Labor & Management Conference (Hollywood, FL)	14 NLMC – National Labor & Management Conference (Hollywood, FL); Valentine's Day
15 NLMC – National Labor & Management Conference (Hollywood, FL)	16 NLMC – National Labor & Management Conference (Hollywood, FL); Presidents' Day	17 NLMC – National Labor & Management Conference (Hollywood, FL); Mardi Gras	18	19	20	21
22 ViVE (Los Angeles, CA); NABIP Capitol Conference (Washington, D.C.)	23 ViVE (Los Angeles, CA); NABIP Capitol Conference (Washington, D.C.); HCAA Executive Forum (San Antonio, TX); IFEBP Advanced Trustees & Administrators Institute (Orlando, FL)	24 ViVE (Los Angeles, CA); NABIP Capitol Conference (Washington, D.C.); HCAA Executive Forum (San Antonio, TX); IFEBP Advanced Trustees & Administrators Institute (Orlando, FL)	25 ViVE (Los Angeles, CA); NABIP Capitol Conference (Washington, D.C.); HCAA Executive Forum (San Antonio, TX); IFEBP Advanced Trustees & Administrators Institute (Orlando, FL); SIIA Healthcare Price Transparency Forum (Jacksonville, FL)	26 SIIA Healthcare Price Transparency Forum (Jacksonville, FL); HCAA Executive Forum (San Antonio, TX); IFEBP Advanced Trustees & Administrators Institute (Orlando, FL)	27	28
01	02	03	04	05	06	07

February

March

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **SIIA Spring Forum** – Have you reviewed the attendee list and connected with prospects for a meeting? Prep now to help you make the most of every conversation at the event.

2. **Enforce Consistency** – B2B buyers need multiple, meaningful touchpoints. Keep outreach steady and value-packed to stay relevant and build trust over time.

3. **Data Hygiene** – A clean CRM isn't just a nice-to-have; it's a competitive advantage. Accurate data gives sales and marketing the clarity they need to target smarter and close faster.

Katie Trescott
VP, Creative

ADVICE THAT DOESN'T MISS

Market Beyond Active Buyers

"Only a small fraction of your audience is ready to buy today. That's why staying visible and consistent matters. If you only show up when you have something to sell, you'll miss the chance to be the brand they remember when they're ready. They might not be an active buyer, but they're always building their shortlist."

HERE'S HOW TO PUT IT INTO PRACTICE

Katie's Marketing Tip

Plan content for the 95% who aren't buying yet. Share insights that solve real problems, spotlight client success stories and create evergreen tools like checklists or readiness guides. Your goal is to stay consistently helpful.

→ **Why it Matters:** Being top of mind before they're ready puts you at the top of the list when they are. Consistent, value-driven visibility earns trust long before the buying conversation starts.

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SUN	MON	TUES	WED	THUR	FRI	SAT
01	02	03	04	05	06	07
08 Daylight Saving Time Begins International Women's Day	09 HIMSS26 Global Health Conference (Las Vegas, NV)	10	11	12	13	14
15	16	17 St. Patrick's Day	18	19 Certified Nurses Day	20	21
22	23	24	25	26	27	28 NCCMP
29 NCCMP Annual Conference (Hollywood, FL)	30 SIIA Spring Exchange (New Orleans, LA) SPBA Spring Meeting (Washington, D.C.) National Doctor's Day	31	01	02	03	04

March

AI in Self-Funded Marketing

Fool's Gold or Full of Gold?

AI is everywhere, and it's not just a shiny new tool. It's here to stay and already changing how our industry operates. For B2B marketers navigating this shift, the goal isn't to avoid AI; it's to mine it wisely.

Where AI Strikes Gold

- **Workflow Automation:** AI can take repetitive tasks off your plate so your team can focus on strategy and execution. No more wasting time drafting call summaries or cleaning up campaign data.
- **Analyzing & Organizing Data:** From cleaning prospect lists to spotting trends in data, AI helps you organize information quickly. The key is to ensure your team maintains and verifies the data.

  BE SMART ABOUT WHAT TYPE OF DATA YOU'RE UPLOADING TO AI

- **Research & Information Gathering:** AI can condense hours of research into minutes, helping you get to strategy and execution faster.

Where AI is Fool's Gold

RISK	EXAMPLE	IMPACT
Surface-Level Output	Content that "sounds smart" but lacks depth or accuracy	Weakens thought leadership
Hallucinated Data	"78% of employees prefer XYZ plan" with no real source	Damages credibility
Competitor Errors	Incorrect pricing, features or claims	Legal & reputation risk
Outdated Information	Using pre-2024 data or missed regulatory updates	Makes you look out of touch
No Pushback	AI "agrees" with bad ideas instead of challenging them	Leads to misguided strategies
Loss of Human Connection	Over-automation replacing 1:1 conversation	Erodes relationships that drive results

The Rush is On, But It's a Moving Target

AI evolves daily with new tools, better models and shifting capabilities. That means how you use AI today won't be how you use it tomorrow. Treat AI like an assistant, not an authority. Verify, validate and ALWAYS apply human judgment.

Because in this business, **relationships and results still come from people.**

April

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **7/1 Approaching** – Now is the time to ramp up your outreach and sales efforts. With the window for new business closing, every conversation and connection counts.

2. **Brokers** – Are you giving them what they need? Co-branded, high-quality materials make their work easier and strengthen your partnership.

3. **Brand Awareness** – It's not one-and-done. Are you keeping your brand in the mix with LinkedIn ads and organic posts, consistent email outreach and event sponsorships?

Emily Wright
Director of Content

ADVICE THAT DOESN'T MISS

Lead With Outcomes, Not Your Solutions

"Your messaging should start with the outcome your audience is trying to achieve, not the service you're offering. Employers and brokers are looking for ways to reduce costs, improve member experience and manage risk. When you lead with those priorities, your message becomes immediately more valuable. Relevance opens the door."

HERE'S HOW TO PUT IT INTO PRACTICE

Emily's Marketing Tip

Audit your current messaging, then rewrite headlines, emails and intros to lead with the buyer's challenge or desired outcome. Build a bank of common goals your audience is solving for and align your content and sales collateral around those drivers.

→ **Why it Matters:** When your audience sees their problem in your message, they lean in. That recognition is what sets you apart as a partner, not just another vendor.

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April

SUN	MON	TUES	WED	THUR	FRI	SAT
29 NCCMP Annual Conference (Hollywood, FL)	30 NCCMP Annual Conference (Hollywood, FL); SIIA Spring Exchange (New Orleans, LA)	31 NCCMP Annual Conference (Hollywood, FL); SIIA Spring Exchange (New Orleans, LA)	01 NCCMP Annual Conference (Hollywood, FL); SIIA Spring Exchange (New Orleans, LA); 4/1 New Business	02	03 Good Friday	04
05 Easter	06	07 World Health Day	08	09 Masters Tournament	10 Masters Tournament	11 Masters Tournament
12 Masters	13 SIIA Future Leaders Forum (Charlotte, NC)	14 SIIA Future Leaders Forum (Charlotte, NC); TABA Spring Conference (San Antonio, TX); NABIP-TX Annual Conference (Corpus Christi, TX)	15 TABA Spring Conference (San Antonio, TX); NABIP-TX Annual Conference (Corpus Christi, TX)	16	17	18
19	20 ACA Health Summit (Las Vegas, NV)	21 ACA Health Summit (Las Vegas, NV)	22 ACA Health Summit (Las Vegas, NV); Business Group on Health Annual Conference (New Orleans, LA); Administrative Professionals Day	23 Business Group on Health Annual Conference (New Orleans, LA)	24 Business Group on Health Annual Conference (New Orleans, LA)	25
26	27	28 BenefitsPRO Broker Expo (Chicago, IL)	29 BenefitsPRO Broker Expo (Chicago, IL)	30 BenefitsPRO Broker Expo (Chicago, IL)	01	02

May

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **Last Chance** – Time is running out to lock in 7/1 business. Without starting conversations in the next few weeks, you'll be hard-pressed to bring in and onboard any new business.

2. **Brokers (Again)** – Are you consistently following up with prospects and staying close to current broker relationships?

3. **Curiosity** – Don't underestimate curiosity in marketing. When planning your next campaign, think about how to spark questions, create intrigue and motivate your audience to take the next step.

Read Our Blog

Brandon Wright
Director of Strategy

ADVICE THAT DOESN'T MISS

Go Where Your Buyers Are

"B2B buyers don't follow a straight path anymore. They move across channels, check multiple sources and often engage long before they ever fill out a form on your website. An omni-channel approach isn't a nice-to-have, it's how you stay visible and relevant throughout the entire decision journey."

HERE'S HOW TO PUT IT INTO PRACTICE

Brandon's Marketing Tip

Choose 3 to 4 key platforms where your buyers already spend time, like LinkedIn, email and your website. Then, build a connected content experience across them. Tailor content to match each channel's behavior: quick value on LinkedIn, deeper insights via email and proof points on your site. Make sure your tone, message and timing stay consistent, so every touchpoint reinforces the last.

→ **Why it Matters:** Buyers rarely convert on the first click. Staying top of mind across multiple touchpoints helps you earn recognition, build familiarity and become the brand they already trust when it's time for a buying decision.

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May

SUN	MON	TUES	WED	THUR	FRI	SAT
26	27	28	29	30	01 National Provider Appreciation Day	02 Kentucky Derby
03	04	05 Cinco de Mayo	06 National Nurses Day	07	08	09
10 Mother's Day	11 Insurance Innovators USA (Nashville, TN)	12 Insurance Innovators USA (Nashville, TN)	13 ICHRA Conference (Nashville, TN)	14 ICHRA Conference (Nashville, TN)	15 ICHRA Conference (Nashville, TN)	16
17	18	19	20 SIIA Cell and Gene Therapy Stakeholder Forum (Minneapolis, MN)	21 SIIA Cell and Gene Therapy Stakeholder Forum (Minneapolis, MN)	22	23
24 / 31	25 Memorial Day	26	27	28	29	30

Say More with Less

No one has time for long reads or patience for vague messaging. In this industry, winning attention starts with brevity, clarity and impact.

Core Messaging Framework

- **Lead with Power:** Start with a sharp, six-or-less word headline that earns a second look.
- **One Strong Sentence:** Nail your point up front.
- **Show Why It Matters:** Tie it to real pain points like cost savings, compliance or outcomes.
- **Offer Depth for the Curious:** Link to deeper content for those who want the full story.

Apply It Everywhere

Brevity should shape every channel you use. Examples include:

- **Email Campaigns:** Lead with a sharp, outcome-driven line and include a clear next step.
- **Presentations:** One message per slide, strong visuals and a clear "ask" to close.
- **Social Posts:** Short, bold statements earn attention and drive clicks.

How to Do It

STEP	WHAT TO DO	EXAMPLE
1 Start with the Core Message	Identify the single most important point and lead with it.	"Cut pharmacy spend by 20% without cutting care."
2 Trim the Fluff	Remove filler words and weak phrasing.	"We deliver results," not "By partnering with us, you may see results in as little as… "
3 Test for Clarity	Read it aloud; if it sounds robotic or confusing, rewrite.	Rewrite "leveraging innovative solutions to optimize workflows" as "We speed up claims processing."
4 Focus on Outcomes, Not Features	Lead with impact and value, not specs.	"30% faster claims processing," not "Our platform integrates easily."
5 Make Every Word Earn Its Place	Every line should grab attention, build trust or drive action.	Remove extra adjectives like "innovative" if they don't add meaning.
6 Offer Depth, Don't Dump Detail	Keep the core message tight, then link to the proof.	Add "See our case study: $1.2M savings in year one."

Why It Works: People are constantly bombarded. Brief, confident messaging doesn't just stand out, it drives action.

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **Self-Service** – Buyers want to explore on their own first. Make it easy with flyers, videos and content that clearly highlight your value.

2. **HCAA TPA Summit** – It's next month. Make sure you've locked in meetings with important prospects, partners and clients, and secure those dinner reservations before they're gone!

3. **Account-Based Marketing (ABM)** – Zero in on high-value accounts by crafting tailored messaging and outreach for each key decision-maker.

Shea Mize
Senior Director of Client Success

ADVICE THAT DOESN'T MISS

Reduce Complexity, Accelerate Trust

"The best marketing doesn't just attract, it prepares. When your content helps prospects ask sharper, more informed questions, you're shortening the sales cycle and elevating the conversation from the start. If your messaging is all surface level, your sales team ends up carrying the full weight of education. In a complex industry like ours, marketing should be doing some of the heavy lifting before the first call ever happens."

HERE'S HOW TO PUT IT INTO PRACTICE

Shea's Marketing Tip

Turn your deep expertise into clarity-building tools. Create resources that demystify key concepts and provide them early in the journey. Use formats like animated explainers, side-by-side comparison guides or Q&A content that addresses real questions you hear from prospects.

→ **Why it Matters:** When buyers feel informed, they feel empowered. Educating them early reduces friction, builds confidence and creates stronger, faster-moving sales conversations.

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SUN	MON	TUES	WED	THUR	FRI	SAT
31	01	02	03	04	05	06
07	08	09	10	11	12	13
14	15	16 SHRM26 (Orlando, FL)	17 SHRM26 (Orlando, FL)	18 SHRM26 (Orlando, FL)	19 SHRM26 (Orlando, FL) Juneteenth	20
21 Father's Day	22	23	24	25	26	27 NABIP
28 NABIP Annual Conference (Atlantic City, NJ) National Insurance Awareness Day	29 NABIP Annual Conference (Atlantic City, NJ)	30 NABIP Annual Conference (Atlantic City, NJ)	01	02	03	04

June

July

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **Halfway There** – 7/1 is behind us, but now's the time to double down. Start building your strategy for 1/1 now to stay ahead.

2. **Client Retention** – Landing a client is just the start. Focus on building loyalty, reducing churn, and turning clients into long-term advocates. Follow these Five Steps to Improve Client Retention.

View the Steps

3. **SIIA National Prep** – Three months out! If you've got a booth, make sure it stands out. Are you driving traffic and planning strong pre- and post-show outreach?

Kevan Olsen
HubSpot Solutions Engineer

ADVICE THAT DOESN'T MISS

Automate Smart Client Nurturing

"Retention starts with relevance, and HubSpot gives you the tools to deliver it at scale. Use automation to send timely check-ins, value-add content after implementation and keep your clients informed. A smart nurture workflow post-sale can build loyalty before the renewal conversation even starts."

HERE'S HOW TO PUT IT INTO PRACTICE

Kevan's Marketing Tip

Build a post-sale nurture workflow that runs year-round. Schedule quarterly touchpoints with helpful content tied to plan milestones, enrollment or common client pain points. Use personalization tokens like name, company, renewal date or location to keep emails feeling custom. Include soft calls to action like feedback requests, FAQs or service spotlights to keep engagement high.

→ **Why it Matters:** Strategic automation keeps your team top of mind without adding manual lift. The more proactive and personalized you are, the less reactive renewal season becomes.

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SUN	MON	TUES	WED	THUR	FRI	SAT
28	29	30	01 7/1 New Business	02	03	04 Independence Day
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27 HCAA TPA Summit (Nashville, TN)	28 HCAA TPA Summit (Nashville, TN) RosettaFest (Nashville, TN)	29 HCAA TPA Summit (Nashville, TN) RosettaFest (Nashville, TN)	30 RosettaFest (Nashville, TN)	31 RosettaFest (Nashville, TN)	01

July

OCTOBER 11-13, 2026

SIIA National Conference Checklist:

Prep and Execute Like a Pro

JW Marriott Desert Ridge,
Phoenix, AZ

BONUS TIP

For our fellow Coke lovers, JW Marriott is a Pepsi-exclusive facility. So, make sure you stock up on all your Diet Coke prior to checking in.

Pre-Event Planning & Outreach

- Nail down a theme for your booth or sponsorship activation. This theme will drive ideas for giveaways, on-site collateral and custom follow-up. **Avoid using the conference theme.**
- Identify high-value prospects (existing clients, warm leads, top prospects). **The SIIA attendee list doesn't provide email addresses, so compare against your existing database or use a data enrichment tool.**
- Conduct pre-event outreach, including email and LinkedIn, to schedule on-site meetings.
- Monitor competitors! How are they promoting? **Find ways to stand out.**
- Book restaurant reservations early, they go fast!
- The on-site FedEx stays busy, so come prepared with essentials!

On-site Networking & Engagement

- Provide swag that is useful, reusable AND travel-friendly. **Bonus points for kid or spouse-approved giveaways.**
- Take pictures! Capture photos with your team and people you're networking with. Don't forget to share them on LinkedIn! **Snap shots of booths you find inspiring, they can spark ideas for the future.**
- Plan to reserve your booth next year while on-site. They go quickly!
- Allow extra time to walk! The resort is large; some destinations could take 10+ minutes to reach.
- The bar and lobby area get very loud. If you're meeting up with a prospect, scout out a quiet location ahead of time.
- Don't miss out on the final night party! It's your last chance to be seen and end the conference on a high note.

Post-Event Follow-Up

- Prioritize leads (hot, warm, cold) and set a structured follow-up timeline.
- Avoid generic "nice to meet you" emails! Personalize with key takeaways and relevant content. **Post-event fatigue is real!**
- Conduct an internal debrief to capture lessons learned and plan for next year.

August

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **Thought Leadership** – In a complex, nuanced industry, clarity wins. Buyers look to trusted voices so, how are you positioning yourself to lead the conversation?

2. **Success Stories** – Your wins are your best marketing. Turn them into case studies that show your value and help prospects choose you with confidence.

3. **Back to School** – ABE: ‘Always Be Educating’ your target audiences. Use every touchpoint to deliver insight, not just information so it builds trust before the first call.

Josh Dawson
Senior Video Producer

ADVICE THAT DOESN’T MISS

Humanize Your Brand with Video

“Video has a unique way of bringing your brand to life. It lets people see the faces behind the work, hear the passion in your voice and feel the impact of what you do. Whether it’s a client story, a product walk-through or a team spotlight, video creates connection. And in a relationship-driven industry like ours, that connection matters.”

HERE’S HOW TO PUT IT INTO PRACTICE

Josh’s Marketing Tip

Start building your video library with content that’s quick to create and high on relatability. Film a 60-second client insight, a behind-the-scenes clip or a simple explainer using your phone and natural light. Add captions, keep it conversational and post on platforms where your audience already engages, like LinkedIn or in nurture emails.

→ **Why it Matters:** Your target audiences want to see and hear the people they’ll be working with. Authentic video builds trust faster than polished decks ever could and keeps your brand human, not just helpful.

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SUN	MON	TUES	WED	THUR	FRI	SAT
26	27	28	29	30	31	01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19 World Humanitarian Day	20	21	22
23 / 30	24 / 31	25	26	27	28	29

August

September

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **SIIA National** – Are you booking 1:1s with prospects and making evening plans with key contacts? Use our Conference Checklist (page 20) to ensure you're maximizing every opportunity.

2. **Regional Events** – Some of the most valuable regional events happen this month. If one aligns with your goals, it's worth showing up and making connections.

3. **Capture Testimonials** – Happy clients, partners and brokers are your best advocates. Don't hesitate to ask for one; this authentic social proof can go a long way in influencing prospects.

Lauren Krueger
Art Director

ADVICE THAT DOESN'T MISS

Make Your Design Work Harder

"You can have the strongest message in the room, but if it's buried in cluttered visuals or dated layouts, no one will hear it. Design isn't decoration, it's communication. And in B2B, clarity always wins."

HERE'S HOW TO PUT IT INTO PRACTICE

Lauren's Marketing Tip

Use design to highlight your value, not just frame it. Break up heavy content with visual proof points: icons for key stats, charts for ROI and pull quotes for credibility. Stick to a consistent visual hierarchy, lean on whitespace and treat every layout like a guided tour.

→ **Why it Matters:** Strong design speeds up understanding. When your message looks clear and credible, your audience is more likely to engage, retain and act.

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SUN	MON	TUES	WED	THUR	FRI	SAT
30	31	01	02	03	04	05
06	07 Labor Day	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	01	02	03

September

Analytics Demystified

Here are a few basic KPIs to help you dip your toes into data and see what's driving engagement.

Website: Your 24/7 Sales Rep

WHAT TO TRACK	WHY IT MATTERS	HOW TO USE IT
Top pages visited	Shows what your audience(s) care about	Focus on what's working: keep these pages updated and link to them in emails or posts.
Time on page	Signals engagement	If time is short, make the message simpler or more relevant. Make sure you offer value!
Form fills	Measures lead capture	Make forms shorter and buttons clearer to encourage more people to complete them.

Email: Your Direct Line

WHAT TO TRACK	WHY IT MATTERS	HOW TO USE IT
Open rates	Tells you if subject lines resonate	Test two subject lines (A/B test) to see which gets more opens.
Click-through rates	Reveals if content drives action	Offer value right away, like a guide, tip or invite, and make the CTA clear and actionable.
Replies	Indicates engagement and trust	When people reply, that's gold. Follow up fast!

LinkedIn: Your Digital Billboard

WHAT TO TRACK	WHY IT MATTERS	HOW TO USE IT
Post impressions (views)	Shows what's catching attention	Post more of what people are already looking at like thought leadership, trends and relevant news.
Engagement (reactions/ comments)	Gauges resonance	Reply to comments, always keep the conversation going!
Follower growth	Indicates reach	Encourage your team to share posts to boost visibility.

Quick Start Checklist

- Pick 3-5 KPIs per channel to track consistently
- Use free tools: Google Analytics (website), email platform reports and LinkedIn analytics
- Schedule monthly reviews: Look for trends, not perfection
- Ask: "What worked? What didn't? What will we try next?"

Ocozzio POV

Even a handful of metrics will make you sharper. Once you're comfortable, layer in more KPIs and watch your marketing work harder for you.

Taylor Stocker
Senior Digital Strategist

October

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **SIIA National** – It's go time! Use the event to build connections, deepen relationships and gather insights to move your business forward.

2. **Qualified Leads** – Don't let those SIIA convos go cold. Get them into your CRM for timely, targeted follow-up with marketing in sync.

3. **Fourth Quarter** – Crunch time. This is your final window to close deals ahead of 1/1. Reconnect with qualified leads, solidify proposals and push opportunities across the finish line.

Michael Hansen
Senior Marketing Strategist

ADVICE THAT DOESN'T MISS

Follow Up Like You Mean It

"Conferences aren't about collecting badges; they're about building trust in real time. It's one of the few places where your handshake carries as much weight as your pitch. Don't waste that face time. Ask smart questions, share real insights and follow up like you mean it."

HERE'S HOW TO PUT IT INTO PRACTICE

Michael's Marketing Tip

Within 48 hours of an event, send a tailored follow-up that references a specific conversation, shares a resource tied to their interest and offers a next step without pressure. Track responses in your CRM so follow-through doesn't fall through.

→ **Why it Matters:** Personal, relevant follow-ups turn chance meetings into real opportunities. The right post-event touchpoint shows you listened and you're already acting like a partner, not a vendor.

October

Calendar Key

- Important Industry or Legislation Date
- Major Industry Conference
- National Event
- Federal Holiday
- Other Holiday

SUN	MON	TUES	WED	THUR	FRI	SAT
27	28	29	30	01 10/1 New Business	02	03
04	05	06	07	08	09	10 World Mental Health Day
11 SIIA National Conference (Phoenix, AZ)	12 SIIA National Conference (Phoenix, AZ) Indigenous Peoples' Day	13 SIIA National Conference (Phoenix, AZ)	14	15	16	17
18	19	20	21	22	23	24
25 IFEBP Annual Employee Benefits Conference (New Orleans, LA)	26 IFEBP Annual Employee Benefits Conference (New Orleans, LA)	27 IFEBP Annual Employee Benefits Conference (New Orleans, LA)	28 IFEBP Annual Employee Benefits Conference (New Orleans, LA)	29	30	31 Halloween

November

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **Messaging Shift** – As the year wraps up, shift toward brand-building outreach. It'll prime your audience for stronger engagement in the new year.

2. **Groundwork** – Don't wait until the new year to get started. Organize your 2027 event plans, align your marketing calendar and outline outreach campaigns to build momentum early.

3. **Holiday Adjustments** – With many people taking time off over the next two months, plan accordingly. Follow up in the new year to keep opportunities moving forward.

Zach Swenson
VP, Business Development

ADVICE THAT DOESN'T MISS

Build Boardroom-Ready Business Cases

"Self-funded decision makers aren't impulsive buyers. They're advisors, C-Suite executives and HR leaders managing risk. If your strategy doesn't help them see and justify the 'why' internally, you're just noise. Equip them with business cases they can take to the boardroom."

HERE'S HOW TO PUT IT INTO PRACTICE

Zach's Marketing Tip

Make it easy for buyers to champion your solution internally. Package up simple, board-ready assets like one-pagers, visual ROI breakdowns and case studies with measurable outcomes. Prioritize clarity, not volume. These tools should make your value easy to present and hard to dismiss.

→ **Why it Matters:** The buying decision isn't made in the first meeting, it's made in the room you're not in. Arming your champions with clear, confident messaging removes friction and positions you as the partner who understands both the problem and the process.

Calendar Key

- Important Industry or Legislation Date
- Major Industry Conference
- National Event
- Federal Holiday
- Other Holiday

SUN	MON	TUES	WED	THUR	FRI	SAT
01 Daylight Saving Time Ends	02	03 Election Day (U.S.)	04	05	06	07
08	09	10	11 Veterans Day	12	13	14
15 HLTH USA (Las Vegas, NV)	16	17	18	19	20	21
22	23	24	25	26 Thanksgiving	27 Black Friday	28
29	30	01	02	03	04	05

November

SEO 🤝 AEO

Even in our relationship-driven industry, decision makers are searching before they ever engage with you. Optimizing your digital presence ensures your brand and message lead the conversation.

Think of it Like Your Office

- **SEO is your sign on the door:** clear, visible and easy to find.
- **AEO is your receptionist** ready with straightforward, trusted answers whenever someone asks.

Together, they make sure prospects find you, trust you and walk in ready to engage.

The Digital Evolution: Simplified

STRATEGY	WHAT IT IS	WHY IT MATTERS	EXAMPLES FOR YOU
SEO (Search Engine Optimization)	Makes your website “findable” on Google.	So prospects see you first when they’re researching solutions.	Ensure your site answers: “What are self-funded plan options?”
AEO (Ask Engine Optimization)	Structures content for voice search and AI platforms.	Buyers now “ask” questions instead of typing keywords.	Post an FAQ like: “How does a reference-based pricing model work?

> **A strong SEO foundation is critical;** an advanced strategy like AEO works only when your site is already search-friendly.

3 Ways to Get Started

1

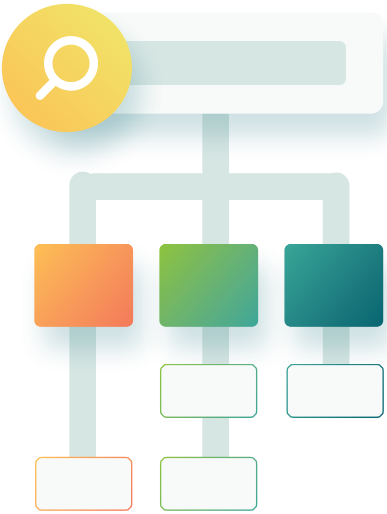
Answer Clearly:
Create simple FAQs, lists and short comparisons that give direct answers to common questions.

2

Keep Content Fresh:
Update regularly with new insights, regulatory changes and proof points to stay accurate and trustworthy.

3

Build Authority:
Show up consistently in credible industry sources. Mentions, reviews and third-party validation strengthen trust.



> **Good reviews and social proof are today's backlinks!**

Ocozzio Insight

This shift isn't about replacing relationships; it's about fueling them. Digital-first means your sign (SEO) is visible, and your receptionist (AEO) is ready with confident answers. By the time prospects pick up the phone, they're already nodding "yes" because your digital presence has done the heavy lifting to build trust and credibility.

> **AI evolves daily!** The tactics you use today may shift tomorrow. Stay ready to adapt your strategy to keep your digital presence strong.

December

STRATEGIC MOVES FOR MOMENTUM

3 Considerations for This Month

1. **Start 2027 Strong** – To hit the ground running in the new year, take stock now. Build on your successes, learn from your setbacks and put strategies in place to drive even stronger results.

2. **Holiday Gifts** – Small gestures make a big impact. How are you showing appreciation to partners and prospects this season?

3. **Marketing Budget** – Start developing your 2027 plan. Even a rough budget for conferences and campaigns help guide smart decisions.

Mimi Wheeler
Senior Director of Digital

ADVICE THAT DOESN'T MISS

Make Every Digital First Impression Count

"Your digital presence is your first meeting. If your website takes more than 5 seconds to load or makes me dig for value, I've already left. The B2B bar is higher now! Optimize like you're trying to earn their next call, not just a website visit."

HERE'S HOW TO PUT IT INTO PRACTICE

Mimi's Marketing Tip

Audit your website and key landing pages through the lens of a first-time visitor. Prioritize fast load speed, value-first headlines and messaging, clear call to actions and mobile responsiveness. Use heatmaps and analytics to see where users stall, then simplify or streamline to keep them moving.

→ **Why it Matters:** Digital friction erodes trust before your team ever gets the chance to build it. A clean experience keeps users engaged and positions your brand as focused and ready to solve their problems.

Calendar Key

- Important Industry or Legislation Date
- Major Industry Conference
- National Event
- Federal Holiday
- Other Holiday

SUN	MON	TUES	WED	THUR	FRI	SAT
29	30	01 Giving Tuesday; World AIDS Day	02	03	04 Hanukkah	05 Hanukkah
06 Hanukkah	07 Hanukkah	08 Hanukkah	09 Hanukkah	10 Hanukkah	11 Hanukkah	12 Hanukkah
13	14	15	16	17	18	19
20	21	22	23	24 Christmas Eve	25 Christmas Day	26
27	28	29	30	31 New Year's Eve	01	02

December

2026 Self-Funded and Employee Benefits Conferences

At Ocozzio, we know industry conferences are where relationships are built, ideas are exchanged and future strategies take shape. We've curated this list to highlight the key events that matter most so you can connect with the right audiences, stay ahead of trends and maximize your impact.

Confirmed Dates

HBCE – Health Benefits Conference & Expo

JANUARY 20–22, 2026 | PONTE VEDRA BEACH, FL

Who Goes: Mid- to senior-level benefits and HR professionals from private and public sector employers, hospitals, healthcare systems and universities (70% corporate, 22% government, 8% service providers). Roles include total rewards, wellness, population health, occupational health and workers' comp/absence management.

Details/Why You Should Consider Attending: HBCE is an educational event for health benefits and wellness innovation. Sessions are heavily case-study driven, focusing on practical strategies for regulation, cost containment and smarter health and wellness programs. Attendees benefit from a strong peer network, CE credit opportunities and access to an exhibit hall showcasing new solutions.

IBEW–NECA Employee Benefits Conference

JANUARY 25–28, 2026 | NAPLES, FL

Who Goes: Union trustees, administrators, consultants and service providers supporting IBEW/NECA multiemployer benefit funds.

Details/Why You Should Consider Attending: This conference is tailored to electrical workers' benefit fund leadership, with content focused on healthcare, pensions and compliance updates. It provides a specialized forum for networking among multiemployer plan stakeholders, making it valuable for those serving the labor fund space.

In·Value·Able Conference & Expo

FEBRUARY 3–4, 2026 | CLEVELAND, OH

Who Goes: HR leaders, benefits managers, brokers, consultants, and health plan professionals from across industries. Roughly 300+ attendees gather annually, including decision-makers actively seeking innovative benefit solutions.

Details/Why You Should Consider Attending: In·Value·Able delivers two days of programming with 20+ sessions led by nationally recognized experts. The event emphasizes innovation, best-practice sharing and actionable strategies to transform employee benefits. Attendees earn SHRM, HRCI, ODI and CEBS continuing education credits, while engaging in dedicated networking sessions and exploring a robust exhibit hall. With 95% of past participants saying they would attend again, the conference is positioned as a high-value, forward-thinking gathering for professionals driving the future of workforce health and benefits.

NLMC – National Labor & Management Conference

FEBRUARY 12–17, 2026 | HOLLYWOOD, FL

Who Goes: Trustees and directors of multiemployer health, welfare and pension funds; fund administrators; union leadership; senior corporate management; labor counsel; and labor relations professionals from both labor and management. Attendance typically exceeds 600 participants.

Details/Why You Should Consider Attending: NLMC has been a premier forum addressing the most pressing issues in labor and management. The conference combines frank conversations with national leaders, thought-provoking sessions, and peer networking. Topics range from pension fund infrastructure investment and cost-saving strategies for health plans to the use of technology and social media to better serve members. It is recognized as one of the most important national gatherings for Taft-Hartley fund managers, union leaders and management stakeholders.

NABIP Capitol Conference

FEBRUARY 22-25, 2026 | WASHINGTON, D.C.

Who Goes: TPAs, brokers, government officials, policymakers, vendors, etc.

Details/Why You Should Consider Attending: The National Association of Benefits and Insurance Professionals (NABIP), previously known as the National Association of Health Underwriters (NAHU), holds this annual meeting that focuses on important industry legislation. Over the course of the four-day event, you'll hear from speakers, interact with colleagues and get a chance for facetime with your congressional representatives on Capitol Hill.

ViVE

FEBRUARY 22-25, 2026 | LOS ANGELES, CA

Who Goes: Healthcare providers, payers, policymakers, investors, entrepreneurs, etc.

Details/Why You Should Consider Attending: While not as specific to self-funding as an HCAA or SIIA event, this conference brings together thousands of executives throughout the healthcare space. For TPAs, it's a good opportunity to network and find potential partnerships. As for vendors, you won't find as dedicated of a self-funded audience as you would with some of the others, but there is opportunity to get in front of some larger payers. There are numerous pre-show networking opportunities to ensure you make the most of the 'larger' spend. Speaking opportunity applications for ViVE are typically due October or November of the previous year.

HCAA Executive Forum

FEBRUARY 23-25, 2026 | SAN ANTONIO, TX

Who Goes: TPAs, brokers, PE firms, service providers, captives, etc. (heavy TPA focus)

Details/Why You Should Consider Attending: The Health Care Administrators Association (HCAA) is one of the leading industry associations and this event brings together top executives from the various sectors of self-funding. The Executive Forum was designed specifically to address today's TPA's financial and operational hurdles and always draws a large TPA, vendor and PE firm audience. Sessions, speakers and resources will be centered around the theme of "Deep Roots, Bold Leaders & Soaring Success." Typically, HCAA Sponsorship/Exhibitor Contracts are due the 15th of the month prior to the conference.

IFEBP Advanced Trustees & Administrators Institute

FEBRUARY 23–25, 2026 | ORLANDO, FL

Who Goes: Experienced multiemployer trustees (those who have attended the New Trustees Institute or served more than two years), along with salaried and contract administrators. Attendees typically include representatives from over 500 funds, with 82% serving multiemployer plans.

Details/Why You Should Consider Attending: For nearly five decades, this Institute has been a cornerstone of trustee and administrator education. With 400+ participants, it is large enough to provide session variety yet small enough to allow meaningful networking. Developed by active trustees, administrators and advisors, the agenda covers legal and regulatory updates, governance best practices and reform initiatives. Attendees gain practical tools, case studies and checklists they can bring back to their funds. The event also includes an exhibit hall where exhibitors can connect directly with fund decision makers.

SIIA Healthcare Price Transparency Forum

FEBRUARY 25-26, 2026 | JACKSONVILLE, FL

Who Goes: TPAs (operations focused), captive managers, self-insured entities, service providers, brokers, data scientists, etc.

Details/Why You Should Consider Attending: Transparency has been a big talking point in the space for the last few years. With the goal of bringing that topic to the forefront of the industry, this event brings together self-funded executives to discuss various updates involving new policy, the rising cost of care, prescription drugs and compliance deadlines. Like most Self-Insurance Institute of America (SIIA) events, you'll find some opportunities to connect with TPAs, brokers, vendors and other important stakeholders.

HIMSS

MARCH 9-12, 2026 | LAS VEGAS, NV

Who Goes: CIOs and top-level executives, healthcare providers, health IT professionals, government officials, consultants, market suppliers, etc.

Details/Why You Should Consider Attending: HIMSS26 offers health IT educational programming and a gathering of many leaders in healthcare, all coming together to enlighten, inspire and lead discussions about health equity, AI, data governance, workforce challenges, digital health transformation, interoperability, cybersecurity, process analysis and redesign and all the latest in health IT.

NCCMP Annual Conference

MARCH 28 – APRIL 1, 2026 | HOLLYWOOD, FL

Who Goes: Trustees, administrators, union leaders, policymakers and service providers connected to multiemployer benefit plans.

Details/Why You Should Consider Attending: NCCMP is the policy and advocacy voice for multiemployer plans. The annual conference brings together regulators, fund managers, and labor/management leaders to discuss legal, legislative,and regulatory developments. It's a critical event for staying ahead of compliance and legislative changes impacting Taft-Hartley funds.

SPBA Spring Meeting

MARCH 30-31, 2026 | WASHINGTON, D.C.

Who Goes: TPAs, brokers, government officials, policymakers, vendors, etc.

Details/Why You Should Consider Attending: The Society of Professional Benefit Administrators (SPBA) holds its regulatory-focused Spring Meeting each year. What's unique about this particular conference is the location, as it allows for attendees to meet with government officials who initiate and implement laws impacting the industry. Educational sessions will focus primarily on new and upcoming legislation impacting self-funded plans.

SIIA Spring Forum

MARCH 30- APRIL 1, 2026 | NEW ORLEANS, LA

Who Goes: TPAs, captive managers, self-insured entities, stop loss providers, brokers, MGUs, etc.

Details/Why You Should Consider Attending: This is the largest SIIA event in the first half of the year. It's formerly a stop loss and MGU specific conference that has since undergone a rebrand. If you're only able to swing one SIIA event in the first half of the year, this should be the one. Take advantage of a sponsorship or advertising opportunity if you can and be sure your team does plenty of outreach prior to attending.

SIIA Future Leaders Forum

APRIL 13-14, 2026 | CHARLOTTE, NC

Who Goes: Self-insurance & captive insurance industry professionals, brokers, etc. (<40 years old)

Details/Why You Should Consider Attending: Since the forum was created for executives under 40, it's a great event to meet with some of the current and future industry leaders in the space. SIIA always prioritizes networking, so you can be sure there will be ample opportunity to establish important relationships that will lead to tomorrow's success.

NABIP-TX Annual Conference

APRIL 14–15, 2026 | CORPUS CHRISTI, TX

Who Goes: Health insurance brokers, agents, consultants and benefits professionals (with a Texas/regional focus).

Details/Why You Should Consider Attending: NABIP's Texas chapter annual meeting offers regional networking and state-specific legislative updates. It's valuable for brokers working in Texas markets, with sessions on compliance, plan innovation and local regulatory trends.

TABA Spring Conference

APRIL 14–15, 2026 | SAN ANTONIO, TX

Who Goes: TPAs, brokers, vendors, captives, self-insured entities, etc.

Details/Why You Should Consider Attending: The Texas Association of Benefit Administrators (TABA) is another larger regional association that holds two events each year, a fall and spring conference. Track sessions are available for those that want to increase their knowledge and skills on specific components in the industry and there will be sessions dedicated solely to brokers as well as those new to self-funding. Plus, the cost of attendance is low compared to some of the other industry conferences.

ACA Health Summit

APRIL 20–22, 2026 | LAS VEGAS, NV

Who Goes: ACA industry executives, FMOs, agencies, agents, insurers and technology/service providers supporting the individual and small-group market. Attendees represent a significant share of ACA marketplace submissions, making this one of the most influential gatherings in the space.

Details/Why You Should Consider Attending: With ACA enrollment surpassing 21 million lives, this event is the central forum for the leaders shaping the future of the exchanges. Attendees gain insights into CMS compliance, regulatory shifts, pricing trends and best practices for growth in the marketplace. The agenda includes sessions on product design, consumer engagement, technology solutions and evolving plan categories. The Summit is also a strong networking platform, connecting agents, brokers and solution providers with ACA decision makers to form partnerships that drive enrollment and innovation.

Business Group on Health Annual Conference

APRIL 22–24, 2026 | NEW ORLEANS, LA

Who Goes: HR and benefits executives from large employers, along with industry innovators, consultants and policy experts. Attendance typically includes 700+ professionals focused on improving workforce health, well-being, and benefits.

Details/Why You Should Consider Attending: This three-day event is designed for large national employers seeking strategies to optimize benefits and manage costs. With 50+ curated sessions, the conference dives into emerging health care trends, workforce strategy and innovative solutions in care delivery and well-being. Attendees gain practical insights from peer case studies and policy discussions while building connections with leaders shaping the future of employer-sponsored healthcare.

BenefitsPRO Broker Expo

APRIL 28-30, 2026 | CHICAGO, IL

Who Goes: Hundreds of benefits advisors, agents, producers, brokers, consultants, planners, etc.

Details/Why You Should Consider Attending: For three days each year, the industry's brokers come together to discuss solutions, trends, insights and other important topics as it relates to employee benefits. If you're looking to tap into a larger pool of brokers, this is the place to be. However, a large majority of the audience makeup will consist of vendors and service providers as well.

Insurance Innovators USA

MAY 11–12, 2026 | NASHVILLE, TN

Who Goes: Senior insurance executives, insurtech leaders, regulators and solution providers. The event attracts 1,500+ attendees, with 75% at the C-level or director level and 50% from insurance carriers.

Details/Why You Should Consider Attending: As America's leading carrier-led insurance innovation conference, Insurance Innovators USA is a hub for thought leadership, digital transformation strategies and emerging market insights. With 200+ speakers and four stages of content, the program covers everything from customer experience to risk management and regulatory change. Attendees benefit from AI-driven matchmaking, one-on-one meetings and networking opportunities designed to spark game-changing partnerships. For vendors and insurtechs, the event offers direct access to top decision makers and an unmatched opportunity to showcase innovations to senior leaders shaping the insurance industry.

ICHRA Conference

MAY 13–14, 2026 | NASHVILLE, TN

Who Goes: Brokers, benefit consultants, ICHRA administrators, and voluntary benefit providers.

Details/Why You Should Consider Attending: This two-day event brings together around 400 attendees focused on the fast-growing ICHRA model. Sessions feature leading experts on flexible benefit design, regulatory considerations and innovative healthcare solutions tailored for employers and their teams. In addition to educational content, attendees can expect extensive networking opportunities and roundtable discussions aimed at shaping the future of ICHRA adoption.

SIIA Cell & Gene Therapy Stakeholders Forum

MAY 20-21, 2026 | MINNEAPOLIS, MN

Who Goes: Self-insurance & captive insurance industry professionals, stop-loss providers, brokers, etc.

Details/Why You Should Consider Attending: Like the Corporate Growth Forum, this event was started within the last few years (2023). This is one of the more niche events SIIA hosts, but it was created after consistent feedback surrounding Cell & Gene Therapy (CGT) as being one of the most important issues impacting the industry. Network with this specific portion of the industry while learning more about the CGT pipeline, plan document guidance, value-based pricing consideration, financial risk strategies and more.

SHRM26

JUNE 16-19, 2026 | ORLANDO, FL

Who Goes: HR professionals, payers, brokers, technology providers, vendors, etc. (heavy HR focus)

Details/Why You Should Consider Attending: This particular conference is more focused on HR as a whole compared to employee healthcare benefits exclusively. However, it does offer the opportunity to get in front of larger employers in addition to employee benefits executives. Packed with over 375 handpicked sessions, tons of speakers and plenty of advertising opportunities, it is definitely a conference worth considering.

NABIP Annual Conference

JUNE 27-30, 2026 | ATLANTIC CITY, NJ

Who Goes: Payers, brokers, vendors, technology providers, consultants, etc.

Details/Why You Should Consider Attending: NABIP holds its Annual Convention in the summer each year. One thing that makes this event unique is that it is held in a different state annually, giving attendees a new venue to establish important relationships. Much like the Capitol Conference, you'll hear from speakers, gain access to professional development opportunities and have plenty of networking events to attend.

HCAA TPA Summit

JULY 27-29, 2026 | NASHVILLE, TN

Who Goes: TPAs, brokers, service providers, captives, etc. (heavy TPA focus)

Details/Why You Should Consider Attending: Like the Executive Forum, this draws a large crowd of executives from TPAs and vendors/service providers. Though it's held in the summer, this is HCAA's last major event of the year and is in a more centralized location than that of some of the other large events later in the year. Though the cost is lower than some other events as well, if you can't swing a sponsorship, there are ample networking opportunities due to the layout of the conference.

RosettaFest 2026

JULY 28-31, 2026 |NASHVILLE, TN

Who Goes: Brokers, TPAs, vendors, service providers, captives, employers, unions, etc. (heavy broker focus)

Details/Why You Should Consider Attending: Along with the BenPro Broker Expo each year, this conference offers a great opportunity to get directly in front of the key broker audience. With four curated program tracks, four packed days of exclusive industry content and plenty of sponsorship opportunities, RosettaFest 2026 is sure to be one of the key conferences of the summer.

ISCEBS Employee Benefits Symposium

AUGUST 23–26, 2026 | PHOENIX, AZ

Who Goes: CEBS, CMS, GBA and RPA designation holders; Society members; plan sponsors; consultants; and professionals from corporations, health systems, consulting firms, law firms and public/multiemployer plans. Widely recognized as one of the largest gatherings of credentialed benefits professionals in the country.

Details/Why You Should Consider Attending: The Symposium is the premier educational and networking event for benefits professionals, offering strategies to strengthen benefits programs in a dynamic labor and economic environment. Attendees gain actionable insights into plan design, compliance and employee engagement, while also staying current on legislative and regulatory changes. The event includes 50+ sessions across multiple tracks, peer networking opportunities and the annual CEBS conferment ceremony recognizing new graduates and specialty track designees. Whether advancing your career or enhancing your organization's benefits strategy, this Symposium delivers education, connections and tools that extend well beyond the event itself.

SIIA National Conference

OCTOBER 11-13, 2026 | PHOENIX, AZ

Who Goes: TPAs, captive managers, self-insured entities, service providers, brokers, etc.

Details/Why You Should Consider Attending: SIIA's biggest and best event of the year. Like many of the other SIIA events, you can expect plenty of self-funded professionals, especially national TPAs, to be in attendance. There are numerous sponsorship, networking and advertising options available.

IFEBP Annual Employee Benefits Conference

OCTOBER 25-28, 2026 | NEW ORLEANS, LA

Who Goes: Taft-Hartley funds, HR professionals, public sector plan trustees, consultants, actuaries, stop loss providers, brokers, TPAs, carriers, coalition leaders, etc.

Details/Why You Should Consider Attending: IFEBP is a very large union and benefit education organization and the annual conference provides a great opportunity for those looking to get involved in Taft Hartley and public sector side of the industry. Plan accordingly with plenty of pre-show outreach as this conference is very well-attended.

HLTH

NOVEMBER 15-18, 2026 | LAS VEGAS, NV

Who Goes: Providers, Health Systems, Payers, Insurance Companies, C-Suite Executives, Employers, Benefits Leaders, Investors, Startups, Pharma, Government Officials and Policymakers and more.

Details/Why You Should Consider Attending: A premier gathering for leaders across the healthcare ecosystem, offering invaluable insights into innovation, policy and industry trends. It's a unique opportunity to network with decision-makers, discover new solutions and stay ahead in a rapidly evolving landscape.

Dates TBA

Employee Benefit Institute (EBI) Annual Conference

TBD 2026 | TBD

Who Goes: HR and benefits professionals, CFOs, plan administrators, attorneys, accountants, brokers, consultants and advisors. The event typically draws several hundred attendees from across a multi-state region.

Details/Why You Should Consider Attending: EBI's Annual Conference is a balanced forum covering both health and welfare benefit plans as well as pension and retirement plans. Sessions regularly feature experts from across the country, including officials from the IRS and Department of Labor, alongside leading consultants and practitioners. Attendees gain insights into regulatory changes, best practices and emerging trends while networking with peers and solution providers. The event is known for delivering high-quality, affordable education thanks to sponsor support, and offers continuing education credits to participants. For those seeking practical strategies across both health and retirement benefits, this conference provides a comprehensive and accessible learning opportunity.

SIIA Artificial Intelligence Forum

TBD 2026 | TBD

Who Goes: TPAs, captive managers, self-insured entities, service providers, brokers, etc.

Details/Why You Should Consider Attending: Conveniently held in the same location immediately after the Price Transparency Forum (PTF), this event will focus on AI's impact on the industry. How is it changing claim review or impacting analytics and population health management? You'll find the answers in Charlotte in late February. Also, expect a similar crowd as the PTF due to timing and location. However, you can expect a heavier PE firm attendance here due to industry speculation surrounding AI.

SIIA Corporate Growth Forum

TBD 2026 | TBD

Who Goes: Self-insurance & captive insurance industry professionals, investors, advisors, PE firms, etc.

Details/Why You Should Consider Attending: The Corporate Growth Forum provides the perfect opportunity to learn about achieving, managing and sustaining growth in your business, specifically as it relates to mergers, acquisitions and capitalizations. Learn from top executives at PE firms about potential partnerships and growth strategies, all while networking with fellow self-funded leaders.

TABA Fall Conference

TBD 2026 | TBD

Who Goes: TPAs, brokers, vendors, captives, self-insured entities, etc.

Details/Why You Should Consider Attending: The TABA Fall Conference tends to be a little better attended than the Spring Conference. So, if you're deciding between the two and timing isn't an issue, this is the best bet. Much like the Spring Conference, the cost of attendance is relatively low and attendees can expect to meet and network with some of the larger payers and brokers in the south.

National Tribal Health Conference

TBD 2026 | TBD

Who Goes: Tribal benefit administrators, TPAs, brokers, consultants, tribal-related business representatives (casinos, school boards, public service, healthcare providers, etc.).

Details/Why You Should Consider Attending: This annual conference hosted by the National Indian Health Board (NIHB) provides the perfect opportunity for those looking to do business with Native American populations and business entities. Founded in 1972, the NIHB serves all 574 federally-recognized tribes and advocates on behalf of tribal health needs.

EXPERT TIP

How to Maximize Sponsorship ROI

Sponsorships are more than logos, they're investments. To get real return, align your spend with measurable business goals.

- **Define your objective:** Are you after lead generation, brand visibility or targeted executive meetings? Match your sponsorship to that goal.
- **Secure early advantages:** The best sponsorship tiers and speaking slots go fast, so commit early to maximize exposure and influence.
- **Engineer your outreach:** If attendee lists are available, start booking meetings 3–4 weeks in advance. Treat pre-show scheduling as part of the sponsorship value.
- **Simplify your on-site strategy:** Arm your team with a clear offer (e.g., badge scan + 60-second demo and takeaway). Assign a dedicated follow-up owner for every lead.
- **Measure what matters:** Skip vanity metrics like raw scans. Track success by quality meetings held, ideal customer profile (ICP) hits and pipeline created within 30 days.

This approach ensures your sponsorship dollars **drive outcomes, not just presence.**

SPBA Fall Meeting

TBD 2026 | TBD

Who Goes: TPAs, brokers, technology providers, vendors, etc.

Details/Why You Should Consider Attending: This SPBA Meeting is focused more on the operational side of running a TPA efficiently as well as new options and markets to offer clients. Members are surveyed throughout the year on topics they'd like to see covered, so you can be sure the educational sessions and speaker presentations are relevant to your business. Since SPBA is made up primarily of TPAs, you can expect a heavy concentration of TPA executives at both the fall and spring meetings.

TAHP Conference + Expo

NOVEMBER 2-4, 2026 | TBD

Who Goes: Healthcare policy experts, payers, brokers, vendors, etc.

Details/Why You Should Consider Attending: The Texas Association of Health Plans (TAHP) brings together healthcare and policy experts at its yearly Conference + Expo, Texas Covered. Discussions are centered around important healthcare issues facing Texas, but attendees from all over will find the discussions and networking opportunities valuable.

CAHP Annual Conference

TBD 2026 | TBD

Who Goes: Healthcare payers, brokers, vendors, consultants, etc.

Details/Why You Should Consider Attending: Though held by a regional association, The California Association of Health Plans (CAHP) Annual Conference gives a unique opportunity to network with some of the top payers and brokers in the country (specifically the Western US). Expect to see over 1,000 attendees come together for discussions on dealing with change, upcoming legislation, industry insights and more.

2026 Legislation & Compliance Dates

Stay ahead of critical compliance and legislative deadlines that impact your self-funded health plan strategy. This page organizes key dates and updates so you can plan, coordinate and communicate with confidence.

Key Compliance Deadlines

CMS Fair Prices (Medicare Drug Price Negotiation) — First 10 Drugs Take Effect

JANUARY 1, 2026

Why It's Important: The first negotiated "maximum fair prices" under the Inflation Reduction Act apply to 10 Medicare Part D drugs starting 1/1/26. While this is a Medicare program (not group-plan pricing), it can influence member behavior and market pricing dynamics. Coordinate messaging with PBM/consultants for member education.

HIPAA Notice of Privacy Practices (NPP) Update — 42 CFR Part 2 Alignment

FEBRUARY 16, 2026

Why It's Important: HHS finalized rules aligning 42 CFR Part 2 (SUD confidentiality) with HIPAA and requires HIPAA covered entities that receive/maintain Part 2 records (including health plans) to update their NPPs by 2/16/26. Note: portions of a separate 2024 "reproductive health" privacy rule were vacated in 2025 litigation; the Part 2 NPP update remains in effect.

Furnish ACA Forms 1095-B/1095-C to Individuals

MARCH 2, 2026

Why It's Important: IRS regulations permanently extend the furnish deadline by 30 days beyond Jan 31; for 2026 that's Monday, March 2. (Most ALEs must also meet electronic filing thresholds.)

Paper-File ACA Transmittals (1094-B/1094-C) & Statements (if eligible)

MARCH 2, 2026

Why It's Important: If still permitted to paper-file, forms are due the same day (Feb 28 falls on a weekend in 2026). Most filers meet the e-file mandate and should file electronically by March 31 (see next item).

E-File ACA 1094/1095 with IRS

MARCH 31, 2026

Why It's Important: Electronic filing deadline for ACA information returns. Nearly all employers now meet the aggregated 10-return e-file threshold.

RxDC (Prescription Drug & Health Care Spending) Report — 2025 Data

JUNE 1, 2026

Why It's Important: Annual federal reporting of plan/prescription drug spending and rebates. Coordinate early with TPAs/PBMs to gather D1–D8 files and plan lists.

Report & Pay PCORI Fee (Form 720)

JULY 31, 2026

Why It's Important: Self-funded plans must pay PCORI annually using IRS Form 720. For plan years ending Jan–Sep 2025, the rate is $3.47 per covered life. IRS will publish the updated rate for plan years ending Oct–Dec 2025 later in 2025—watch for that notice.

Gag Clause Prohibition Compliance Attestation (CAA 2021)

DECEMBER 31, 2026 (ANNUAL)

Why It's Important: Plans must annually attest no prohibited "gag" clauses exist in provider/TPA/PBM contracts (e.g., blocking access to price/quality data). Confirm your TPA will attest for the plan and document it.

MHPAEA Final Rules — Additional NQTL Standards Begin

PLAN YEARS STARTING ON OR AFTER JANUARY 1, 2026 (CALENDAR-YEAR PLANS: 1/1/26)

Why It's Important: The 2024 MHPAEA final rules phase in new requirements (e.g., outcomes data evaluation, "meaningful benefits," and enhanced NQTL comparative analysis content) for 2026 plan years. Agencies announced targeted enforcement relief while litigation proceeds—keep your written NQTL analyses current and ready within the required response time.

Legislation Watchlist

Lower Costs, More Transparency Act

DECEMBER 11, 2023 (PASSED THE HOUSE; NO FINAL ACTION AS OF AUG 2025)

Why It's Important: Would expand price transparency obligations. Track for potential revival or inclusion in future packages.

Medicare Part D "PBM Performance/DIR Fees" at Point of Sale

JANUARY 1, 2024 (IN EFFECT)

Why It's Important: Pharmacy price concessions now applied at POS in Part D, reducing after-the-fact DIR fees. Not an ERISA plan deadline, but impacts pharmacy economics and member experiences.

Required Annual Notices & Disclosures

Medicare Part D Creditable/Non-Creditable Coverage Notices

PRIOR TO OCTOBER 15, 2026 (Medicare Part D OE) + CMS Online Disclosure: WITHIN 60 DAYS OF PLAN-YEAR START (e.g., by Mar 1 for calendar-year plans)

Why It's Important: Required to inform Medicare-eligible participants about whether the plan's Rx coverage is creditable; separate annual online disclosure to CMS is also required.

HIPAA Privacy: Notice of Privacy Practices (NPP)

AT ENROLLMENT; REMINDER AT LEAST EVERY 3 YEARS; ON MATERIAL REVISION

Why It's Important: Health plans must give the NPP to enrollees and remind them every three years that it's available (and provide updated versions after material changes). Also see the Feb 16, 2026 Part 2 alignment update above.

HIPAA Special Enrollment Rights Notice

AT OR BEFORE INITIAL ELIGIBILITY/ENROLLMENT

Why It's Important: Describes mid-year enrollment rights after certain life events or loss of other coverage; must be provided when employees are first offered enrollment.

CHIPRA Premium Assistance Notice

ANNUALLY (BEFORE THE PLAN YEAR STARTS)

Why It's Important: Must be provided to all employees residing in states offering Medicaid/CHIP premium assistance; can be bundled with OE materials.

Availability of Health Insurance Marketplace (Exchange) Notice

FOR NEW HIRES: WITHIN 14 DAYS OF START DATE

Why It's Important: FLSA-covered employers must provide the Marketplace coverage options notice to every new hire (model notices available from DOL).

Women's Health & Cancer Rights Act (WHCRA) Annual Notice

ANNUALLY (AND AT ENROLLMENT)

Why It's Important: Plans must notify participants each year of post-mastectomy reconstruction rights (DOL permits abbreviated annual language).

From Strategy to Results,

Let's Make Every Move Count

Thank you for using our 2026 Self-Funded Marketing Calendar. Here's to making every date count and moving the needle for your business.

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