

Ohio Association of Health Underwriters Policy and Procedures

POLICY TITLE: LPRT Application Expense Reimbursement Policy
CLASSIFICATION: Board / Finance
POLICY NUMBER: 2009-1101
MOTION: Bob Lackey
SECONDED: Jeff Russell
DATE SUBMITTED (initial): 11/19/09
DATE APPROVED: 11/19/09
APPROVED BY: Board of Directors

RENEWED: November 2011
MOTION: Dave Kross
SECONDED: Sam Fiorentino
APPROVED BY: Board of Directors

RENEWED: January 17, 2013
MOTION: Ingrid Martin
SECONDED: John Dodd
APPROVED BY: Board of Directors
SUNSET DATE: November 2013

RENEWED: September 26, 2013
MOTION: Kevin Conrad
SECONDED: Kathy Lee
APPROVED BY: Board of Directors
SUNSET DATE: November 1, 2015

RENEWED: September 26, 2013
MOTION: John Susie
SECONDED: Carol Conway
APPROVED BY: Board of Directors
SUNSET DATE: October 22, 2015

RENEWED: October 22, 2015
MOTION: John Susie
SECONDED: Carol Conway
APPROVED BY: Board of Directors
SUNSET DATE: October 22, 2017

MOTION TO RENEW 3/12/19 Carol Conway
SECONDED: Ingrid Martin
SUNSET DATE: March 2023

Purpose: To encourage OAHU Board members to apply for membership into the Leading Producers Round Table of NAHU and to define the policies for reimbursement of expenses by the above mentioned members of the OAHU who incur expenses in the valid course of applying for the Leading Producers Round Table (LPRT) designation of NAHU.

Policy:

1. All expense requests must be submitted within 60 days of validation of designation, using the standard OAHU Expense Reimbursement Form.
2. Itemized Receipt and proof of application are required for all expenses.
3. Members are expected to but not required to attend LPRT functions at the following:
 - a. Capitol Conference
 - b. NAHU Symposium
 - c. Region III Meeting – Meetings as Assigned
4. \$100.00 being the maximum reimbursement per OAHU board member up to the maximum of the budgeted line item.