

# NEWS from SIIA Members

## 2017 MARCH MEMBER NEWS

### **SIIA Diamond, Gold & Silver Member News**

*SIIA Diamond, Gold, and Silver member companies are leaders in the self-insurance/captive insurance marketplace. Provided below are news highlights from these upgraded members. News items should be submitted to Wrenne Bartlett at [wbartlett@siiia.org](mailto:wbartlett@siiia.org). All submissions are subject to editing for brevity. Information about upgraded memberships can be accessed online at [www.siiia.org](http://www.siiia.org). For immediate assistance, please contact Jennifer Ivy at [jivy@siiia.org](mailto:jivy@siiia.org). If you would like to learn more about the benefits of SIIA's premium memberships, please contact Jennifer Ivy and [jivy@siiia.org](mailto:jivy@siiia.org).*



### Diamond Members

#### **Zelis™ Healthcare Announces Chief Commercial Officer**

Zelis™ Healthcare, a market-leading healthcare information technology company, is pleased to announce that Patrick O'Keefe is Chief Commercial Officer for Zelis Healthcare.

Mr. O'Keefe joins the executive team with responsibility for Sales, Account Management and Commercial Operations.

Mr. O'Keefe is a proven healthcare leader with deep expertise in building and leading high performing businesses and sales organizations with small to large size organizations.

Mr. O'Keefe was General Manager of Anthem|Empire BlueCross Blue Shield where he had P&L accountability for financial and operational results of a New York Commercial business generating over \$1 billion in revenue.

Mr. O'Keefe served as Northeast Region Mergers & Acquisitions Partner for Digital Insurance, National Practice Leader for UnitedHealth Group, Vice President of Key Accounts and Regional Vice President of Tri-State Small Business for United. In addition, he held various sales leadership positions at Fitzmaurice & Company, LLC, (now Willis Towers Watson), ChannelPoint, Inc. (now TriZetto) and HIP of New York (now EmblemHealth).

Mr. O'Keefe earned his BA in Economics & Political Science from Villanova University.

"Pat has an outstanding record in our space, and I am confident that he will assist us in reaching our major milestones," said Doug Klingler, CEO of Zelis Healthcare.

"I am thrilled to have the opportunity to join the Zelis team," said Mr O'Keefe. "It is an exciting time for Zelis and I look forward to utilizing my market experience to support our efforts to achieve our growth objectives and ensure the highest satisfaction of our clients."

To learn more about Zelis Healthcare, visit us on Facebook, follow us on Twitter, or connect with us on LinkedIn.

#### About Zelis™ Healthcare

*Zelis Healthcare is a healthcare information technology company and market-leading provider of end-to-end healthcare claims cost management and payments solutions including network solutions, claims integrity and electronic payments serving healthcare payer clients, healthcare providers and healthcare consumers in the medical, dental and workers' compensation markets nationwide. Zelis Healthcare is backed by Parthenon Capital Partners.*

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## Silver Members

### Oklahoma Approves Atlas as Captive Manager

Atlas Insurance Management has been accepted by the Oklahoma Department of Insurance to act as a manager for captive insurance business in the state.

The approval makes Atlas the first North Carolina-based captive manager to be accepted by Oklahoma.

Martin Eveleigh, chairman of Atlas Insurance Management, said: "We are pleased to have received approval to do business in Oklahoma."

"The state is a growing domicile, and we are looking forward to working with Oklahoma's captive insurance division. Atlas already has two captives that we will be managing in this new domicile."

In addition to Oklahoma, Atlas Insurance Management recently received approval to act as a captive insurance manager in South Carolina.

### Capstone's CEO Named Top ERC Pioneer 2016

Industry publication, Captive Review, announced honors for Capstone and its CEO and General Counsel, Stewart A. Feldman, for their work in the captive insurance industry.

Earning a spot on its 2016 Enterprise Risk Captive (ERC) Pioneers List for the second time, Feldman received recognition for being one of the top 20 U.S. persons involved with mid-market captive insurance.

"I am honored to receive this recognition once again by Captive Review with my inclusion onto its Enterprise Risk Captive - Pioneers List," said Feldman. "This recognition is a testament to the ongoing commitment that Capstone and The Feldman Law Firm LLP have to our clients -- providing industry-leading, comprehensive

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captive planning services. As enter into 2017, Capstone and the Firm will continue to offer high quality, turnkey planning, encompassing insurance, accounting, tax and legal representation for captive clients. I want to thank Team Capstone, headed by Charles B. Earls III, its President and by its VP-Operations, Megan M. Brooks, for their ongoing commitment to excellent client service, as well as the contribution of our law firm's attorneys, particularly tax lawyer Logan Gremillion, senior tax attorney, Steve D. Cohen, head of our law firm's tax department; and senior corporate lawyer, Michael T. Kelly, in making this recognition possible."

Mr. Feldman has been the chief executive officer of Capstone Associated Services, Ltd. for over 19 years. Under his leadership, in collaboration with The Feldman Law Firm LLP, Capstone has formed over 200 separate and distinct captive insurance companies (exclusive of cell and series arrangements), for business owners nationwide. The Firm has also led more than 55 tax controversies to successful conclusions, which include three tax court cases. They are among the leaders in identifying industry issues, including those imposed by the 2010 Dodd Frank Act, and more recently have called industry attention to the many impaired "LLC-type" cell and series arrangements.

Feldman draws upon a strong tax, financial, and accounting background, dating back to a career in public accounting in the 1970s following his completion of graduate business school. Mr. Feldman brings 30+ years of experience on the substantive business side of transactions along with the perspective offered as an attorney and as a former practicing CPA.

Stewart A. Feldman earned a position on the ERC Pioneers List in 2015 as well as the 26th worldwide position on the publication's Power 50 List in 2014.



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## Gold Members

### QBE's Phillip Giles Selected for Captive Review's 'Power 50' List

Phillip Giles, Vice President of Sales & Marketing for QBE North America's Accident & Health division, was recently named to Captive Review Magazine's '2017 Power 50' list. The Power 50 is a ranked list recognizing the most influential professionals in the global captive insurance industry who are likely to continue influencing the industry's direction and progress in the future.

Giles, ranked number 35, is distinguished by the publication as a key player in the medical stop loss industry. In 2016, he successfully worked to promote greater expansion, education and integrity within the medical stop loss and alternative risk industry. "This is an amazing honor, especially considering the level of professionalism that is represented by the other individuals on this list," said Giles.

The Captive Review "Power 50 List" can be viewed at the following link: <http://captive-review.com/digitaleditions/reports/Power%2050%202017/index.html>

#### About QBE

QBE's North American-based Accident & Health division provides exemplary coverage and services to support the specialized needs of self-insured employers as a leading direct-writing provider of medical stop loss, including single-parent and group captive programs requiring stop loss insurance.

QBE North America is part of QBE Insurance Group Limited, one of the largest insurers and reinsurers worldwide. QBE NA reported Gross Written Premiums in 2015 of \$4.6 billion. QBE Insurance Group's 2015 results can be found at [www.qbena.com](http://www.qbena.com). Headquartered in Sydney, Australia, QBE operates out of 37 countries around the globe, with a presence in every key insurance market. The North America division, headquartered in New York, conducts business through its property and casualty insurance subsidiaries. QBE insurance companies are rated "A" (Excellent) by A.M. Best and "A+" by Standard & Poor's. Additional information can be found at [www.qbena.com](http://www.qbena.com), or follow QBE North America on Twitter. Contact Phillip Giles, Vice President - Sales & Marketing, at [Phillip.Giles@us.qbe.com](mailto:Phillip.Giles@us.qbe.com), 910.420.8104 and visit [www.qbena.com](http://www.qbena.com).

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## **ELMC Group, LLC Appoints Industry Veteran John Gedney to the Role of Executive VP, Chief Growth Officer**

ELMC Group, LLC, ("ELMC"), a manager of premier, full-service managing general underwriters ("MGUs") specializing in underwriting medical stop-loss insurance, announces the hiring of John Gedney into the role of Executive Vice President, Chief Growth Officer. Gedney is an employee benefits entrepreneur with more than 30 years of experience helping companies optimize their benefits plans and is considered an industry expert in the emerging Private Exchange market.

In his new role, Gedney will drive business development and new market opportunities that will further ELMC's accelerated rate of growth and profitability. Prior to joining ELMC, Gedney held the position of Vice President of National Partnerships at Liazon, a Willis Towers Watson company, where he was responsible for creating, developing and overseeing the national broker partner channel.

"John is known throughout the industry as a pioneer who has been on the leading edge of significant industry shifts including managed care and technology," said Richard Fleder, co-founder and CEO of ELMC. "His expertise and experience uniquely positions him to lead our business development efforts, and he will be a great addition to our senior leadership team," said Fleder.

Gedney's previous industry experience includes executive positions with Oxford Health Plans and EBP Healthplans, at the time the nation's leading mid-market, Third Party Administrator and MGU. Prior to joining EBP, John owned an employee benefits advisory firm, Securis, and was a founder of OnlineBenefits, the creator Benergy, the industry leading benefits communications portal.

Gedney holds a Bachelor's Degree in Business from Adelphi University. He is a former finalist in Ernst & Young's Entrepreneur of the Year award and has mentored entrepreneurs in formulating and growing their businesses. ■



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**Insurance Commissioner Karen Weldin Stewart**

# SIIA would like to Recognize our Leadership and Welcome New Members

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# SIIA New Members

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