

NEWS

from SIIA
Members

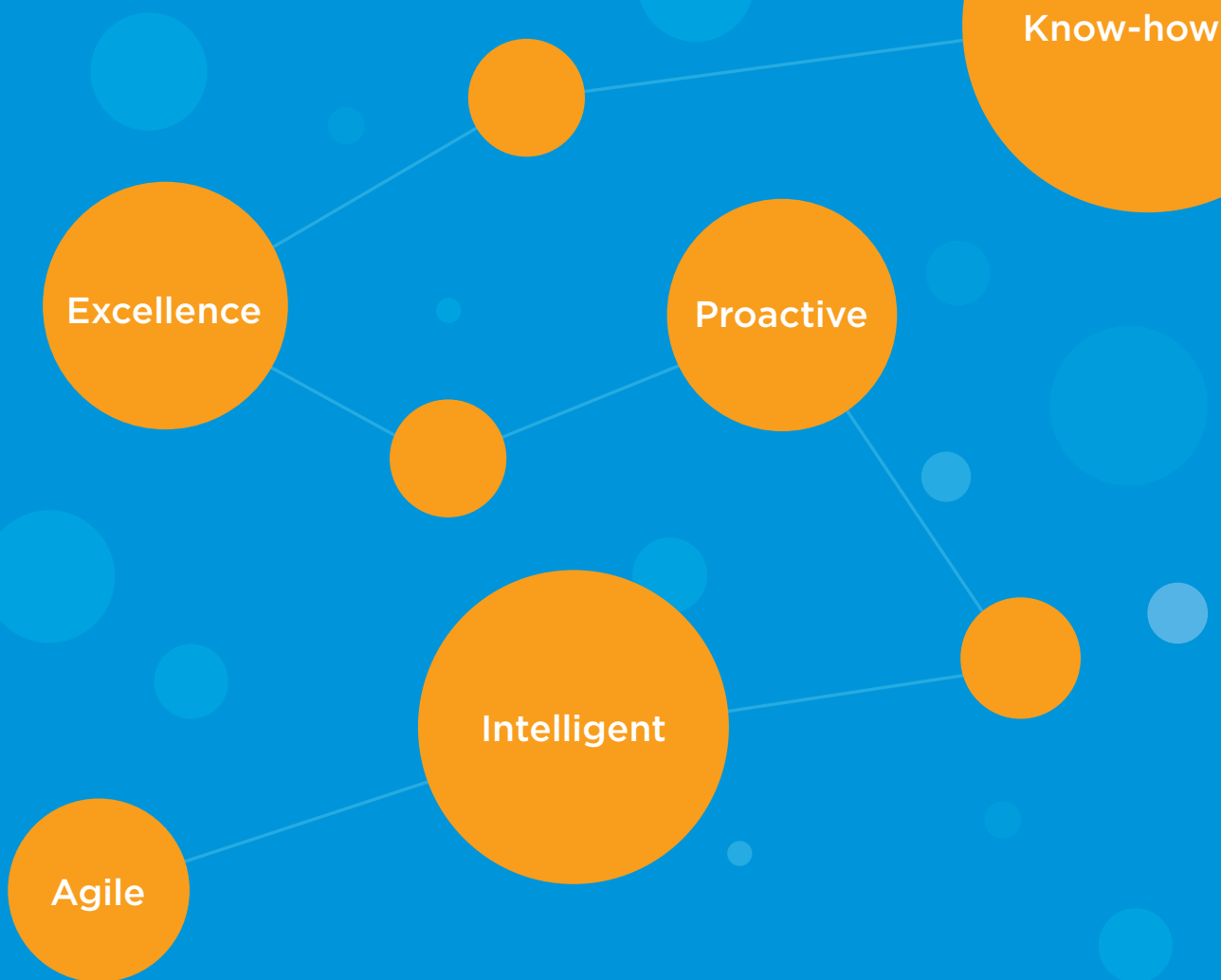


2018 APRIL MEMBER NEWS

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@siaa.org. All submissions are subject to editing for brevity. Information about upgraded memberships can be accessed online at www.siaa.org. For immediate assistance, please contact Jennifer Ivy at jivy@siaa.org. If you would like to learn more about the benefits of SIIA's premium memberships, please contact Jennifer Ivy and jivy@siaa.org.

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Diamond Members

Sun Life Launches an Exciting New Partnership with Collective Health

Sun Life launched an exciting new partnership with Collective Health, an innovative healthcare technology company with an advanced digital workforce health management system designed for employers who self-fund their employee health plans. Collective Health and Sun Life will offer employers a seamless experience by integrating stop-loss insurance into the platform and collaborating on data analytics to provide employers with more opportunity to manage risk and keep healthcare costs down, and give employees a better healthcare experience.

Industry data show 60 percent of workers in the U.S. are covered by self-funded medical plans. More employers are continuing to convert from fully insured plans. The Sun Life/Collective Health partnership is a major step toward bringing this growing sector innovative ways to administer their employee benefits, effectively manage risk, drive down costs, and maintain the protection of stop-loss for high-dollar claims.

Learn more at sunlife.com.

Berkley Accident and Health Appoints Edward Murphy as Regional Sales Manager

Berkley Accident and Health, a Berkley Company®, has appointed Edward Murphy as Regional Sales Manager for its rapidly growing Stop Loss business. In his new role, Ed will be responsible for business development and existing relationships in the upper Midwest region of Illinois, Indiana, Ohio, and Wisconsin.

“Ed brings knowledge of both the Stop Loss business and TPA operations to Berkley Accident and Health, and we are excited to have him join our team,” said Christopher Brown, President and CEO. “Ed’s background will directly benefit our distribution partners and policyholders, as they navigate the increasingly complex world of employee benefits,” continued Brown.



ELAP Services is a leading healthcare solution for self-funded employers across the U.S., offering unparalleled cost savings and advocacy services.

ELAP’s services, which encompass plan design, claims auditing, member advocacy and legal defense, emphasize collaboration and strengthen partnerships. ELAP builds meaningful connections with employers, members, and hospitals and health systems, to ensure a fair price for quality healthcare.



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Prior to joining Berkley Accident and Health, Ed held successful sales and leadership positions at two national third-party administrators (TPAs), where he made long-lasting connections in the Midwest area. He was also responsible for claims and customer service at a large managed care organization. This diverse background has made Ed highly skilled at uncovering clients' needs and customizing the right solutions to best meet those needs.

Ed Murphy will be based out of the company's Chicago, IL office.

About Berkley Accident and Health

Berkley Accident and Health is a member company of W. R. Berkley Corporation, a Fortune 500® company. Berkley Accident and Health provides an innovative portfolio of accident and health insurance products. It offers four categories of products: Employer Stop Loss, Group Captive, Managed Care (including HMO Reinsurance and Provider Excess), and Specialty Accident. The company underwrites Stop Loss coverage through Berkley Life and Health Insurance Company, rated A+ (Superior) by A.M. Best.

Mehb Khoja Named President of Medical Risk Managers, Inc.

Symetra Financial Corporation today announced the appointment of Mehb Khoja as president of Medical Risk Managers, Inc. (MRM), a managing general underwriting and consulting firm specializing in medical stop-loss insurance and a wholly owned subsidiary of Symetra.

Khoja will be responsible for the strategic and operational management of the South Windsor, Connecticut-based company. He succeeds Thomas Doran, who departed MRM last year.

Khoja brings an extensive background as a healthcare actuary and management consultant to his new role, joining MRM from Milliman in Chicago, where he focused

on the growth of Milliman's stop-loss management and employee benefits businesses. Prior to Milliman, Khoja spent 13 years with Mercer Health and Benefits as a principal and actuary, most recently serving as Central Market Stop Loss Center of Excellence leader and an employee benefits consultant to a range of mid-market employers. Khoja is a frequent conference speaker on stop-loss marketplace issues and the author of multiple industry survey reports.

"I could not be more pleased to have Mehb join MRM's leadership team," said MRM Chairman Mike McLean. "Mehb's impressive background is deeply rooted in understanding both the client and carrier sides of the medical stop-loss equation. His expertise will be especially valuable to MRM clients in today's fluid healthcare environment as employers continue to look for solutions to help them efficiently manage employee benefit costs."

Khoja received a Bachelor of Arts in actuarial science and finance from the University of Illinois at Urbana-Champaign. He is a Fellow of the Society of Actuaries and a Member of the American Academy of Actuaries.

Symetra Financial Corporation acquired Medical Risk Managers, Inc., in May 2007. MRM operates independently of Symetra's stop-loss business, underwriting self-funded business for multiple partners. Medical stop-loss insurance coverage helps protect employers that self-insure their employee benefit plans against large, potentially catastrophic claims.



About Medical Risk Managers

Medical Risk Managers, Inc. is a full-service managing general underwriting and consulting firm that specializes in group stop-loss insurance. Founded in 1984, the South Windsor, Connecticut-based company provides clients with underwriting, actuarial, stop-loss claim adjudication, network evaluation, accounting support and strategy consulting. For more information, visit www.mrm-mgu.com.

About Symetra

Symetra Financial Corporation is a diversified financial services company based in Bellevue, Washington. In business since 1957, Symetra provides employee benefits, annuities and life insurance through a national network of benefit consultants, financial institutions, and independent agents and advisors. For more information, visit www.symetra.com.

Silver Members

Professional Benefits Administrators (PBA) Has Opening for Proven Sales Professional

Job description: Sales Executive

Position Summary


Professional Benefits Administrators (PBA) is looking for a proven outside sales professional to take our growth to the next level. Interested candidates should possess 8-10 years of sales experience within the Employee Benefits ecosystem, with the ability to quickly impact PBA's growth by identifying new broker prospects and closing third-party administrator agreements with C-level executives interested in the many benefits of PBA's core service offerings. The ideal candidate is a disciplined self-starter; possesses a "just get 'er done" spirit; as well as the desire to develop, maintain, and grow relationships with clientele.

We are looking for a proven "hunter" that is hungry to make a difference. Responsibilities include prospecting targeted brokers that meet PBA's qualification criteria and then aligning with key decision makers within those brokers to endorse the PBA value proposition,

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collaboratively negotiate agreements and close contracts with the broker's individual clients.

Responsibilities

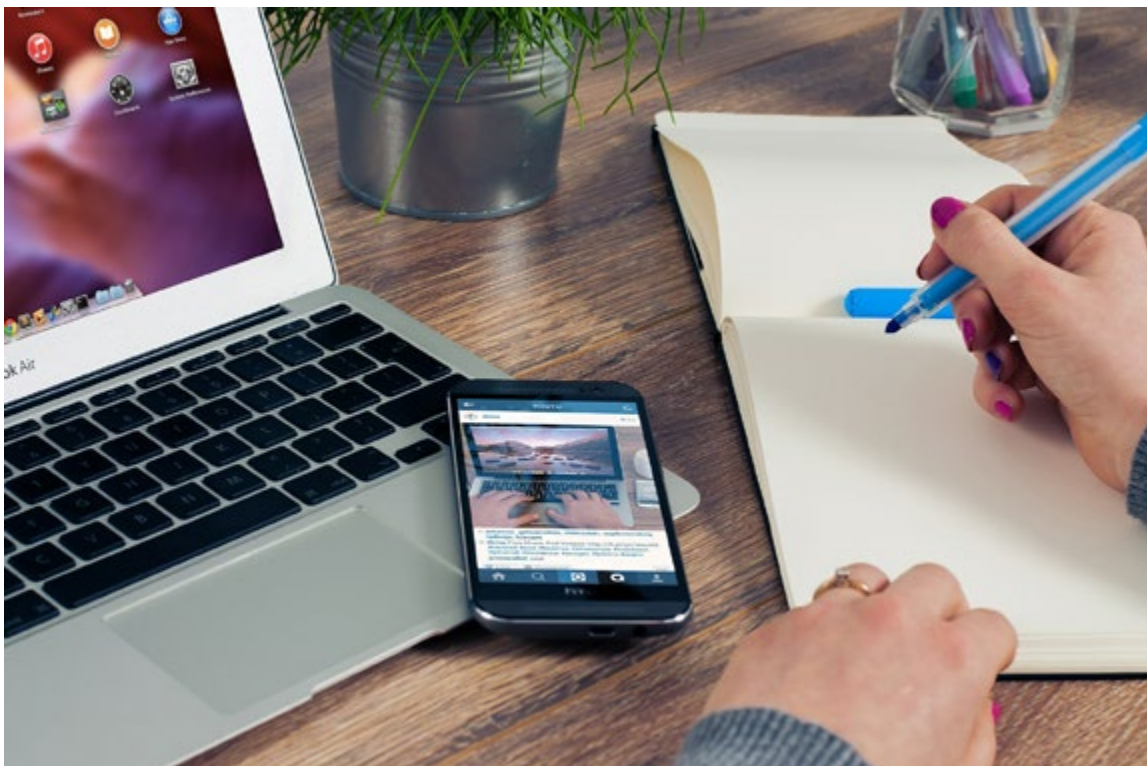
- Identify qualified broker prospects
- Generate and/or qualify sales leads within geographic territory
- Win over brokers to gain access to their clients
- Build trustful relationships with brokers to pitch benefits of PBA to their own business, as well as the benefits of TPA to their clients
- Present PBA value prop, educate clients and negotiate terms for agreements, and getting to contract closure in a timely manner to meet quarterly revenue goals

- Be able to quickly understand if a client agreement is not going to happen, be able to walk away and move on to another qualified broker
- Record and track agreement signing milestones to ensure projects are completed in a timely manner

Skills and Knowledge Qualifications

- 8-10+ years of experience in channel selling within the Employee Benefits ecosystem
- Must have reliable transportation
- Proven track record of closing deals by following a disciplined sales process, including a commitment to prospecting, qualifying, discovering client needs, handling objections and the confidence to ask for the order

- Possess an entrepreneurial spirit and the desire to develop, maintain, and grow relationships with clientele
- Experience using Salesforce.com, as well as MSFT Office and other business software
- A sense of urgency, a no-nonsense focus on results, and the ability to work remotely and independently
- Proven ability and personal presence to converse with and persuade stakeholders at all levels of management, including C-suite executives
- Strong business acumen with the ability to understand economic impacts and ROI



- Capacity to interact and communicate effectively with internal resources and executives
- A proven ability to handle complexity
- Effective listening skills, ensuring the sales prospects needs are clearly understood and they are a match for the program
- Ability to effectively work under tight deadlines and manage projects independently
- Resourcefulness in solving problems
- Excellent people skills and an upbeat and enthusiastic attitude
- Interested candidates can e-mail resumes to jobs@pbaclaims.com

About PBA

Based in Oakbrook, Illinois, Professional Benefits Administrators (PBA), is one of the leading third-party administrators in the industry. Simply put, we specialize in managing our clients benefits and claims so they can manage their business! Our driving force is to empower our customers to navigate the complex healthcare system and exceed their expectations.

Additionally, PBA promises three things to all employees:

- employee investment
- work-life balance
- growth opportunities

With experience dating back to 1985, PBA has dedicated our growth and success to our outstanding team and core values: Trust, Commitment, Team Work, Communication, and Integrity. We are privately owned and here to stay. Come join the PBA team and be an exciting addition to our innovation and success! Visit www.pbaclaims.com.

Gold Members

Zurich Insurance again named one of the Top Companies for Executive Women by the National Association for Female Executives

Zurich Insurance has been named one of the 2018 Top Companies for Executive Women by the National Association for Female Executives (NAFE). The award recognizes American corporations where women have significant clout to make the decisions that affect their company's future and its bottom line. It's the third consecutive year Zurich has earned this honor.

"We are honored to again be recognized by NAFE as a top company for executive women. Zurich believes having a diverse workforce drives better outcomes, inspiring confidence in our employees and our customers to help them reach their full potential," said Kathleen

Savio, CEO of Zurich North America.



The NAFE survey tracks and examines how many employees have access to programs and policies that promote advancement of women and how many employees take advantage of them, plus how companies train managers to help women advance.

"NAFE's annual scrutiny of women's progress at American companies offers essential data about the movement of women into top leadership in the private sector," said Betty Spence, president of NAFE. "In this first year of having five NAFE Top Companies with boards of 50% or more women, we point to a synergy between the greater presence of women on the board and an increase in the number of winning companies with women CEOs and with 50%-plus women in the C-suite (10 companies)."

Zurich has a robust employee resource group for women called the Women's Innovation Network or WIN. This group

plays a critical role in the development and engagement of women with more than 1,800 members in North America. WIN provides a professional network for inspiration, development and connection to colleagues across Zurich and has more than 5,000 members in 15 countries. Zurich also was selected by Working Mother magazine as one of the 100 Best Companies from 2014 through 2017.

About the Methodology

The 2018 NAFE Top Companies application includes some 200 questions on female representation at all levels, especially the corporate officer and profit-and-loss ranks. The vetting process includes tracking access and usage of programs and policies that promote the advancement of women as well as the training and accountability of managers in relation to the number of women who advance. In order to be eligible for the NAFE Top Companies survey, entrants must have a minimum of 1,000 employees, two women

on the Board of Directors and be a public or private company. NAFE also separately names the Top 10 companies in the nonprofit sector. The full report on this year's winners is online here.

About Zurich

Zurich Insurance Group (Zurich) is a leading multi-line insurer that serves its customers in global and local markets. With about 53,000 employees, it provides a wide range of property and casualty, and life insurance products and services in more than 210 countries and territories. Zurich's customers include individuals, small businesses, and mid-sized and large companies, as well as multinational corporations. The Group is headquartered in Zurich, Switzerland, where it was founded in 1872. The holding company, Zurich Insurance Group Ltd (ZURN), is listed on the SIX Swiss Exchange and has a level I American Depositary Receipt (ZURVY) program, which is traded over-the-counter on OTCQX. Further information about Zurich is available at www.zurich.com.



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About NAFE

The National Association for Female Executives (NAFE), founded in 1972, serves 20,000 members nationwide with networking, tools and solutions to strengthen and grow their careers and businesses. Working Mother magazine publishes the annual NAFE Top Companies list. NAFE.com provides up-to-date information, a community for women in business, and access to member benefits. NAFE is a division of Working Mother Media, owned by the Bonnier Corporation. ■



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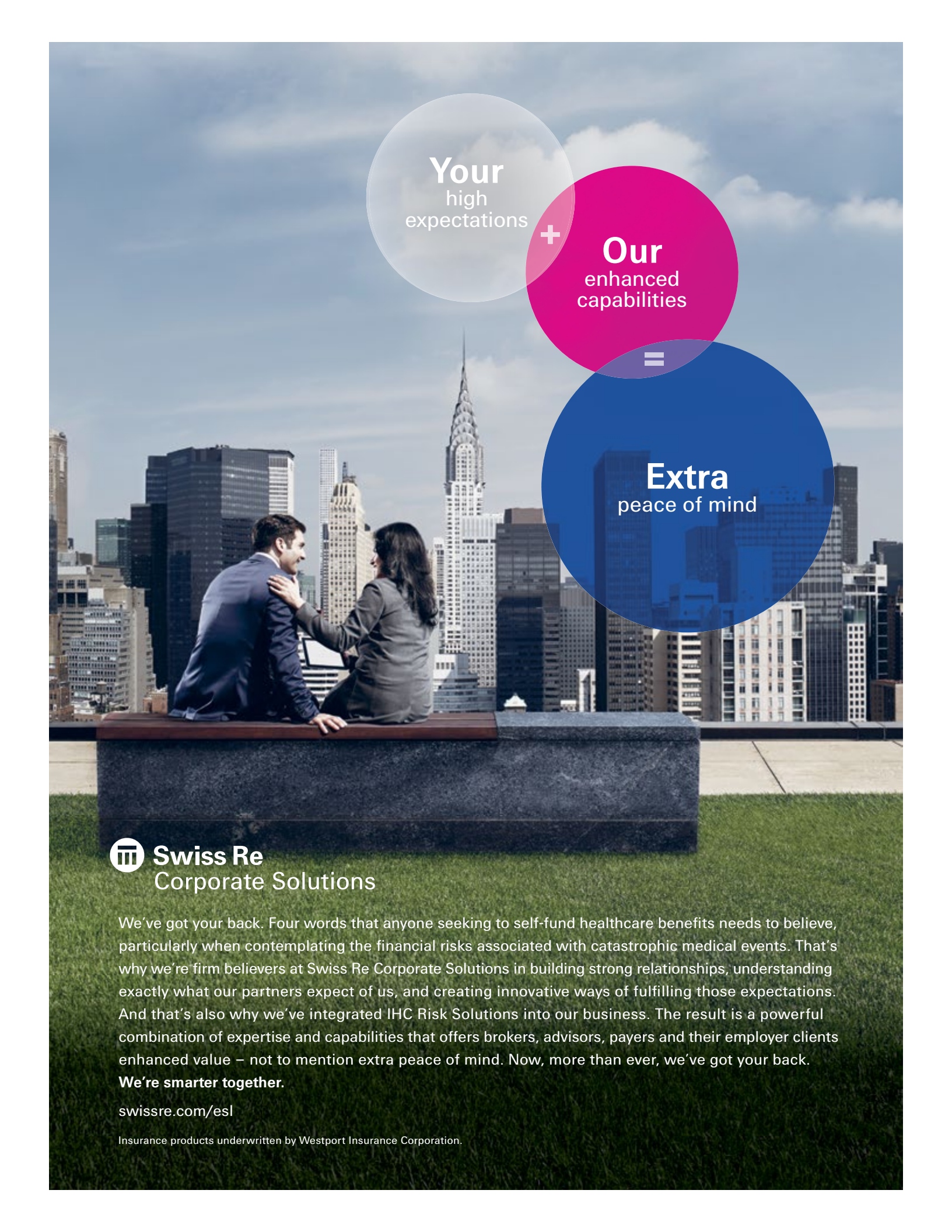
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