



NEWS

FROM SIIA MEMBERS

JULY 2025 MEMBER NEWS

SIIA boasts a very active and dynamic membership. Here are some of the latest developments from the companies powering the self-insurance industry.

Slash Costs, Not Care.

Smarter healthcare strategies that protect your people – and your bottom line.

Captive Resources offers several Medical Stop Loss (MSL) group captive programs designed to meet the unique needs of companies today. Key benefits for employers include:



Greater control over program elements, allowing each member-company to define the structure of its benefits plan.



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Extensive opportunities to collaborate and share best practices with like-minded, engaged employers.



Learn how a group captive can reduce your company's insurance costs. Scan the QR code to connect with our team today.

Companies Combine Under Beyond Health Brand

Beyond Risk Topco Holdings, LP announced the strategic consolidation and rebranding of its three premier employee healthcare benefits insurance businesses under the unified "Beyond Health" brand.

This strategic initiative combines:

- Beyond Health - A premier employee health benefits group captive program with multiple cells operated within HatterasRe Ltd. and managed by Bev Cap Management, LLC ("BevCap")
- SL Management Partners, LLC –(SLMP) A leading full-service medical stop loss managing general underwriter (MGU) providing innovative stop loss and claims solutions
- BeyondRe Stop Loss Insurance Services - A fast-growing underwriter of stop-loss captive programs and a business unit within BevCap

This strategic integration creates a comprehensive platform that streamlines the client experience while maintaining specialized expertise in both captive and traditional stop-loss solutions. The executive leadership team brings together industry veterans with more than 120 years of combined employee benefits and underwriting experience:

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ONPOINT SOLUTIONS


Meritain **GO**

Meritain Health is an independent subsidiary of Aetna® and CVS Health®, and one of the nation's largest employee benefits administrators.¹ We are uniquely positioned to enable our customers to combine our flexible plan administration, products and external point solutions with the right resources from parent companies Aetna and CVS Health.

¹. Business Insurance; Largest Employee Benefit TPAs (as ranked by 2019 benefits claims revenue); May 2020.

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JW MARRIOTT DESERT RIDGE | BALLROOM LAWN | 7:30P-10P

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- SLMP founders Steve Solomon and Robert (Bob) Lang, who joined Beyond Risk in 2024
- John Kirke, President of BevCap's Healthcare Captives business
- Steve McFarland, Chief Underwriter, Managing Director of BeyondRe
- Lance Abbott, CEO of BevCap and Beyond Risk Board Member

"This rebrand and collaboration perfectly aligns with our vision for Beyond Health, BevCap, and the Beyond Risk suite of medical stop loss services," said Lance Abbott, CEO of BevCap and Beyond Risk Board Member. "By uniting our teams and leveraging our collective expertise, we're creating a more efficient, scalable platform that can better address the evolving needs of our carrier partners and clients."

H.H.C. Group Maintains IRO Accreditation

H.H.C. Group (H.H.C.) announced that it has been re-approved by multiple states in which it currently conducts Independent Medical Reviews (IMRs), typically for disputes regarding coverage by payors based on medical treatment necessity or appropriateness. These state designations reinforce H.H.C.'s position as a URAC-accredited Independent Review Organization (IRO) and highlight the company's vital role in helping payors resolve claim disputes efficiently, compliantly and with clinical precision.



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"Acceptance by 32 states positions us as a trusted partner from coast to coast," says Bruce D. Roffé, president and CEO of H.H.C. Group. "In most states, once a coverage denial occurs, insurers must refer the case to the state, which assigns it to an approved IRO. In others, insurers can contract directly with an IRO like H.H.C.-and we are fully equipped to support both pathways. Additionally, numerous insurers have H.H.C. help them determine if they should cover a treatment requested by a plan enrollee."



Tony Minnich

Tony Minnich Promoted at Tokio Marine HCC – A&H Group

Tokio Marine HCC – A&H Group announced the promotion of Tony Minnich to Senior Vice President of Captives. We extend our congratulations to Tony on this significant achievement.

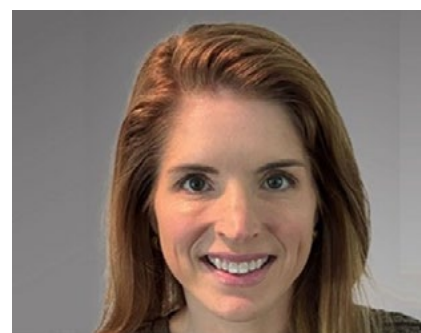
"I am very excited and honored to continue to lead the TMHCC Stop Loss Captive. In this new role, I look forward to helping our captive members and partners continue to grow and thrive, as we have done for 13 years," said Tony Minnich.

Centivo Names New Chief Financial Officer

Centivo announced the appointment of Sarah Fraser as Chief Financial Officer. This key leadership hire comes as Centivo enters a new phase of growth, expanding the reach of its primary care-focused health plan for self-funded employers.

In her role, Fraser will lead Centivo's capital markets strategy, overseeing banking, debt, and equity relationships in addition to applying a strategic, data-driven approach to financial performance across customer segments, product lines and markets to fuel the company's expansion.

"To support our mission of fixing healthcare for the working American family, we need world-class financial leadership—and Sarah brings just that," said Centivo co-founder and CEO Ashok Subramanian. "Her depth of experience across high-growth healthcare and tech companies, combined with a keen strategic mind and a collaborative approach, will be instrumental as we scale our impact and continue to deliver on our promise of radically affordable healthcare."



Sarah Fraser

Dallas Scrip Joins Marpai as President & COO

Marpai, Inc. announced a significant addition to its leadership team with the appointment of Dallas Scrip as President and Chief Operating Officer. This strategic hire underscores Marpai's commitment to accelerating profitable growth and enhancing operational excellence within the dynamic healthcare landscape.

Prior to joining Marpai, Mr. Scrip demonstrated significant success in startup, early-stage, and growth situations, scaling private equity and venture capital-owned companies. His expertise spans servicing healthcare consumers, employers, providers, and payor markets, with a strong foundation in sales and



Dallas Scrip

business development. Scrip is known for his process-oriented approach, identifying market needs, and strategically transforming companies through organic growth initiatives.

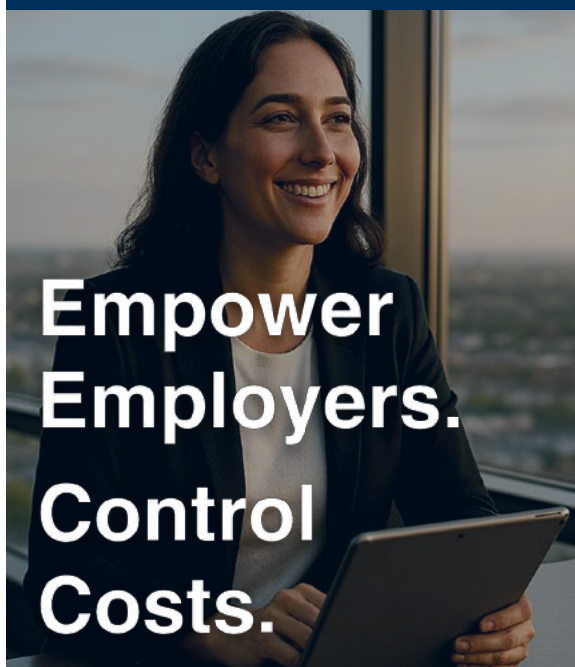
"We believe that the addition of Dallas to our leadership team is a pivotal step in Marpai's journey towards sustainable and profitable high growth," stated Damien Lamendola, Chief Executive Officer of Marpai Inc. "His extensive experience and proven ability to deliver results in complex healthcare environments will be invaluable as we continue to scale our operations and enhance our service offerings. Dallas' deep understanding of the TPA landscape and his commitment to building high-performance teams align perfectly with Marpai's vision for the future."

QBE Reorganizes Geographic Operations

QBE North America announced that it has reorganized the East region of its Accident & Health business into two distinct territories: the Northeast and the Southeast. Bruce Shaver, based in Atlanta, GA, has joined the company to lead the newly established Southeast region. With nearly two decades of insurance experience, Shaver brings a strong foundation in both risk assessment and client engagement. Zach Sullivan will continue to lead the Northeast region from Marblehead, MA.

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Bruce Shaver

"As our Accident & Health business continues to grow, we've made a strategic investment to deepen our understanding of — and responsiveness to — our partners," said Tara Krauss, President of Accident & Health. "With Bruce aboard, we aim to deliver more localized support and enhance our connections with partners across the Southeast."

Alliant Insurance Services Taps Dan Powers to Help Lead Value-Based Health Care Practice

Dan Powers has joined Alliant Insurance Services as Senior Vice President with the Value-Based Healthcare and Risk Management Solutions practice of Alliant's Employee Benefits Group. With more than two decades of experience in business development, partner strategy, and reinsurance, Powers will lead the practice's reinsurance strategy and

alternative risk initiatives.

"Dan's leadership and deep expertise will be instrumental in advancing the ongoing expansion of our Value-Based Healthcare and Risk Management Solutions practice," said Kevin Overbey, President of Alliant Employee Benefits. "He brings a forward-thinking approach and a strong grasp of the complexities shaping today's healthcare landscape".

Based in Boston, Powers will work closely with healthcare providers, systems, and payers to design customized financial protection strategies. His leadership and expertise in risk transfer solutions, alternative risk arrangements, captive insurance programs, and population health risk analytics will further the team's ability to improve care and reduce costs for clients in value-based contracts.

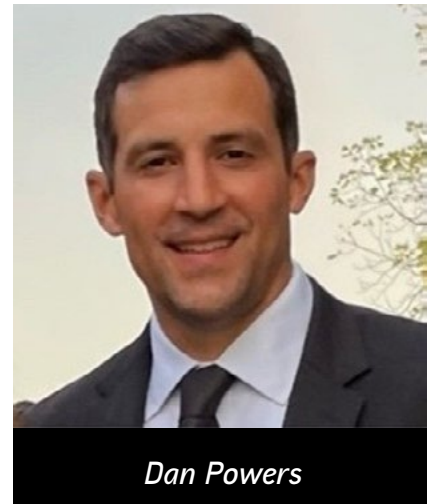
PBA to Acquire JP Farley

Professional Benefit Administrators Inc. (PBA), based in Oakbrook, Illinois, announced it would be acquiring JP Farley (JPF), headquartered in Westlake, Ohio, and merging operations, creating a unified entity poised to offer enhanced benefits and administrative services to clients nationwide.

This strategic acquisition brings together two organizations with a rich history of providing exceptional service with over 80 years of combined experience in self-funded health plan administration.

The combined expertise and resources of PBA and JPF will enable PBA to deliver innovative solutions, improved efficiencies, and an expanded suite of services to meet the evolving needs of brokers and employers in our market.

Jeff Walter, President of Professional Benefit Administrators Inc., is enthusiastic about the acquisition: "We are thrilled to work with Jim and his team to take our long-term association to the next level with this merger. Adding JPF's innovative benefit design portfolio to PBA's suite of products, management, and



Dan Powers

processes will allow us to offer a strong alternative for succession and growth in the independent TPA market. This merger represents a significant milestone in our commitment to providing exceptional benefit administration services. Together, we will create a stronger, more dynamic organization that is well-equipped to meet the challenges and opportunities in our industry."

Jim Farley, President and CEO of JP Farley, echoed these sentiments: "PBA is a great fit for JP FarleyCorp. I've been determined to execute a succession arrangement within an independent TPA structure so that JP Farley Corp can maintain its sole focus on serving the employer plan sponsors and their employees we are privileged to work with. It was important for me to avoid the inevitable conflicts of interest in ownership that hospitals, insurers, or private equity organizations have historically created for independent TPAs. I am looking forward to working together for another 10 or 15 years!"

The transaction is expected to be finalized early in the fall of 2025, subject to all administrative tasks and customary closing conditions. Both organizations are dedicated to ensuring a smooth transition for their clients and employees.



A SPECIALIST APPROACH TO HEALTHCARE



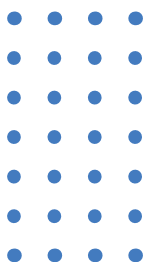
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Skyward Recognized as One of the Best Companies for Employees

Skyward Specialty Insurance Group, Inc.™ has been named one of 2025-2026 Best Companies to Work For by US News & World Report for the second consecutive year. The company earned recognition in three categories, including Overall, Industry: Finance & Insurance, and Region: South. US News & World Report selects recipients of this honor based on an independent analysis of publicly available data, not applications or corporate submissions.

“What makes this recognition so meaningful is that it is grounded in the real experiences of our employees,” said Skyward Specialty Chairman & CEO Andrew Robinson. “In the five years since our rebrand as Skyward Specialty, we’ve built an incredibly engaged and compassionate culture that is only possible because of the people building it. This honor reinforces the strength of our culture and the depth of our commitment to every team member.”

Hamilton, NJ – Berkley Accident and Health, a Berkley Company, is pleased to announce the appointment of David Braxton as Regional Sales Manager in the Southeast. In this role, David will be responsible for driving growth and developing new Stop Loss relationships and Captive



David Braxton

Insurance programs, primarily in North Carolina and South Carolina.

"We are excited to have David join our team," said Brad Nieland, President and CEO of Berkley Accident and Health. "David brings more than 20 years of insurance experience to our organization. He has held sales and leadership roles in a number of large national insurance carriers. David's deep understanding of stop loss and health insurance will be an asset to our policyholders and broker partners."



Jeff Miller

Jeff Miller Returns to Lockton to Lead Stop-Loss and Pharmacy Practices

Lockton announced the appointment of a new national practice leader to help drive the continued growth of its People Solutions business.

Jeff returns to Lockton as National Practice Leader for the Stop Loss and Pharmacy practices, bringing more than three decades of industry leadership and a wealth of experience developing and deploying innovative solutions to meet changing client needs across a range of capabilities.

He previously served as President of Point6 Healthcare and Office President at Ryan Specialty Benefits, where he oversaw organizational growth while aligning operations across several acquisitions.

"It's a pleasure to welcome Jeff back home to Lockton," said Tim Meacham, President, People Solutions. "His leadership and experience across several critical areas of employee benefits is just what we need, at the right moment, to continue to provide the best possible value to our clients."



In his previous Lockton tenure, Miller was EVP and Practice Leader, directing senior leadership across practice areas like actuarial, integrated absence, precision health and wellbeing, compliance, global benefits, and voluntary benefits. He also played a key role in the acquisition and integration of Excelsior Solutions, a pharmacy consulting practice, and the alignment of offices in both Houston and San Antonio.



Jamie Potecha

Take Command Taps Jamie Potecha to Run Operations

Take Command announced that Jamie Potecha has been appointed the company's Chief Operating Officer. Potecha will lead efforts to strengthen the systems and teams that make it easier for employees to navigate and maximize their health benefits.

Potecha brings more than 15 years of experience leading healthcare companies, and he most recently served as Head of Operations, Product Strategy, & Compliance at Granular Insurance. He was an early leader for the health risk management company and built scalable processes that helped transform Granular into one of the largest stop-loss insurers.

"Jamie is a natural leader who will bring extensive expertise in operations, strategy, and product management to Take Command," said Take Command CEO Jack Hooper. "He will build upon his track record of scaling systems and assembling high-performing teams to support our growth and innovation. Jamie's arrival reinforces our commitment to providing our customers and partners with the infrastructure and resources they need to deliver an exceptional employee health insurance experience on a reliable, predictable budget." ■



SIIA NEW MEMBERS

JUNE 2025

NEW CORPORATE MEMBERS

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Senior Sales Executive
BASELoad and W-9 Corrections
Rock Hill, SC

Shannon Jensen
Founder/Consultant
Clover Consulting Group
Billings, MT

Austin Browning
CEO
Faros Health
Dallas, TX

Hadley Waterbury
Marketing Coordinator
Navion
Williamsville, NY

Elle Fair
Associate, People & Culture
RxSense
Boston, MA

Sarah Zoccolante
VP Client Services
Triton Healthcare Partners
Boston, MA

Charlie Hildebrand
President, Payer Solutions
Unity Preferred Network
Oklahoma City, OK

Robert Williams
Chairman
Vengroff Williams Inc.
Sarasota, FL

Jacob Brody
Co-Founder & CEO
ZorroRX
Patterson, NY

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