



NEWS FROM SIA MEMBERS

JANUARY 2026 MEMBER NEWS

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

The Phia Group Secures Major Equity Investment from InTandem Capital Partners

InTandem Capital Partners, a healthcare services-focused private equity firm, announced that it has completed an equity investment in The Phia Group.

Adam V. Russo, Co-Founder and CEO of The Phia Group, stated, “I am incredibly proud of not only our team’s tremendous success over the past twenty-five years, but also our unwavering commitment to our family-centric culture that prioritizes employees’ well-being. I look forward to working alongside InTandem during the next stage of our evolution. InTandem’s approach perfectly aligns with our values. Their

experience in employer-sponsored healthcare will allow us to continue expanding in exciting new ways, while remaining true to our core values and way of doing business. Building and improving upon what our clients know and love about us – that’s the name of the game.”

“In a healthcare ecosystem where cost containment is a critical area of focus, in particular for small and medium-sized employer groups, to combat the rising healthcare costs, best-in-class solutions are required to position self-funded employers and plan sponsors for success,” stated Brad Coppens, Senior Partner at InTandem. “Outsourcing cost containment and payment integrity functions is not nearly enough to deliver meaningful savings, and The Phia Group is uniquely positioned with a leading advisory business to support clients beyond recovery opportunities. We’re thrilled to partner with Adam Russo and The Phia Group team to further the company’s leadership position in delivering performance excellence in healthcare cost containment.”

“Our partnership with Adam and The Phia Group over the past several years has not only been a highly successful investment for WestView, but has enabled Phia’s success in delivering incredible value for its employer and plan sponsor clients, and the significant advancement of its mission to lower healthcare costs and improve access to care,” stated Matt Carroll, Managing Partner at WestView Capital Partners. “We are pleased to be able to remain as a significant investor in the business alongside InTandem and the Phia team.”



InTandem is joined in its investment by strategic co-investments from HarbourVest Partners and Partners Capital, each among the largest and most well-respected institutional investors in the global alternative investment market.

Intellivo Recognized for Fast Growth

Intellivo announced it ranked 438 on the Deloitte Technology Fast 500™, a ranking of the 500 fastest-growing technology, media, telecommunications, life sciences, fintech, and energy tech companies in North America, now in its 31st year. Intellivo grew 154% during this period.

As healthcare inflation accelerates, health plans are under mounting pressure to find non-abrasive, member-friendly ways to manage rising costs. Intellivo meets this challenge by recovering reimbursements on medical expenses that should be paid by alternative insurance sources, such as motor vehicle accident (MVA) or workers’ compensation policies, rather than by the health plan itself.

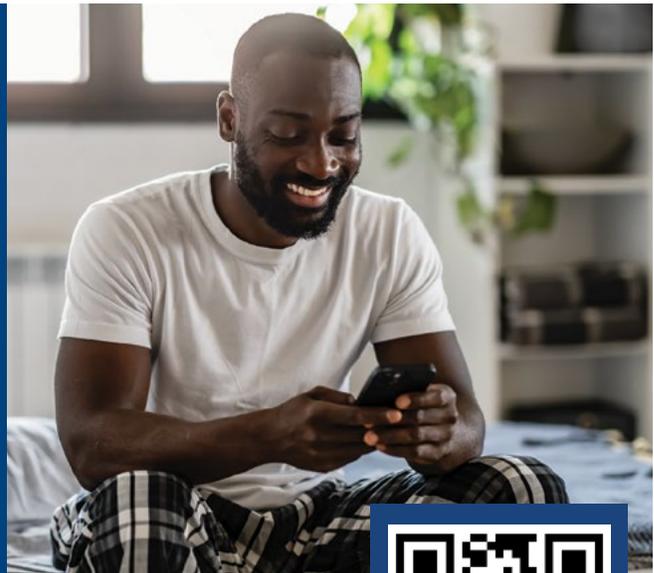
Intellivo’s Chief Executive Officer, Laura Hescocock, credits the company’s revenue growth to its proprietary process for obtaining accident-related and alternative policy information without ever contacting the plan member. “It’s a win-win for both the health plan and the member,” Hescocock said. “Health plans recover more of what they’re owed while members experience a seamless, friction-free process that never disrupts their care.”



**Introducing Meritain Health®
OnPoint Solutions and Meritain Go**

- Our new program focused on strategically engaging members is here! Gain access to
- market-leading, curated point solutions. And
- connect members to a brand-new platform for a digitally enhanced experience.

Talk to us about **OnPoint Solutions** and **Meritain Go** today!



Learn more at www.meritain.com.

Follow us:

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.



Darren Ashby
Consociate Health

Consociates Names New President

Consociate Health, a leading Third-Party Administrator delivering innovative healthcare solutions, announced Darren Ashby as its new President, joining CEO and Chairman Darren Reynolds to lead the company's next phase of growth.

Ashby brings 35 years of experience in third-party administration, with extensive expertise in healthcare and benefits leadership. Throughout his career, he has held multiple leadership roles within the industry, building long-standing relationships and a deep understanding of the evolving needs of employers, advisors, and plan members.

"I lead by example," said Ashby. "What drew me to Consociate is the company's commitment to family, community, and making a meaningful impact on people's lives."

Reynolds added, "We're very excited to have Darren join us. He's a strong leader who shares our culture and values. This is good for our company, our clients, and our employees. Having Darren as our president ensures we continue to grow and innovate while maintaining the culture that makes Consociate special."



Under Ashby's leadership, Consociate aims to leverage technology and actionable analytics to enhance service delivery and employee benefits programs, while keeping the human element at the center of their work. "Technology will play a major role in the future," Ashby said, "but in service, you can't remove the human element."

Jared Ionin to Lead Technology Strategy at Crum & Forster

Crum & Forster's (C&F) Accident & Health Division announces that Jared Ionin has joined as Chief Digital Officer. In this role, Ionin will oversee the Division's technology strategy and operations, strengthening its digital infrastructure and establishing a roadmap for continued innovation and scalability.

"Jared's deep expertise in insurance technology and track record of leading successful transformation initiatives make him an outstanding addition to our A&H leadership team," said David Butterfield, Chief of Staff, Accident & Health Division at Crum & Forster. "As we advance toward our ambitious growth objectives, investing in technology and exceptional talent is a priority. With Jared's leadership, we're further enhancing our digital capabilities to empower our teams, improve efficiencies, and deliver even greater value to our partners and policyholders."

Ionin brings more than 24 years of experience, including 19 years in the specialty insurance industry, where he transformed IT organizations and drove business process optimization. He joins C&F from The Hartford, where he led technology teams and oversaw modernization initiatives that improved operational performance and accelerated digital enablement. He previously held senior leadership roles where he led large-scale system integrations, software development, and automation efforts.

"I'm honored to join Crum & Forster and contribute to the Accident & Health Division's continued growth," said Ionin. "C&F has built a strong foundation of innovation, collaboration, and excellence. I look forward to partnering with our talented teams to strengthen the technology ecosystem, embrace emerging tools, and create scalable digital solutions that support our business and partners well into the future."

HM Insurance Group Expands Regional Responsibilities of Key Stop-Loss Sales Executive

Evan Stratton's role within the HM Insurance Group (HM) Stop Loss Sales division has expanded, according to a company



*Jared Ionin
Crum & Forster*



*Evan Stratton
HM Insurance Group (HM)
Stop Loss Sales division*

announcement. He now serves as director, Phoenix Regional Sales, in addition to his position as director, Denver Regional Sales.

In this dual capacity, Stratton is responsible for growing and maintaining the HM Stop Loss book of business across the company's Phoenix territory, which serves Arizona, Nevada, and Southern California, while continuing to manage the Stop Loss book of business in the Denver territory, which includes Colorado, Utah, and New Mexico. He looks forward to working with producers in the Phoenix market, while continuing to collaborate with those in the Denver region as well.

Greg Arms Joins IS Benefits Board

Integrated Solutions for Benefits and Insurance Services (IS Benefits), a provider of stop-loss underwriting, specialty drug management, and claims auditing for self-funded employers, announced the appointment of Greg Arms as a member of the Company's Board of Directors.

Greg brings more than four decades of global experience in the insurance and employee benefits industry. Over his career, he has held senior roles with leading carriers and brokers, including Chubb Group of Insurance Companies (as Global Head of Accident & Health / COO, A&H), Marsh & McLennan (Global Co-Leader, Mercer Marsh Benefits), Willis Group (Chairman & CEO, Global Employee Benefits Practice), UnitedHealth Group (Chief Marketing Officer, International) and AIG (President / Worldwide Director, Group Management Division).

Meet IsraelPharm:

Your New International Sourcing Partner

Save money without compromise



Licensed | Trusted | Affordable

- Brand medications from Israel
- Licensed pharmacy, global standards
- Save big on high-cost prescriptions



Call or email us to learn more:

 1-604-805-9470  isource@israelpharm.com



Greg Arms
Integrated Solutions for Benefits and Insurance Services

"At IS Benefits, we are poised for growth, both in scale and capability," said Nancy Young, Founder of IS Benefits. "Greg's industry insight, sales and marketing experience, and leadership in employee benefits will greatly accelerate our ability to serve self-funded employers with innovative stop-loss and specialty drug solutions. We are thrilled to welcome him to our Board."

"I'm excited to join IS Benefits at such a dynamic point in the company's journey," said Greg Arms. "The team has built a strong foundation of experience and client trust. I look forward to helping expand our impact by leveraging innovation, analytics, and strategic partnerships to support meaningful value to self-funded employers and their employees."

Alliant Expands Self-Insured Health Plan Expertise with New Hire

Michael Kniery has joined Alliant Insurance Services as First Vice President within its Employee Benefits Group. The Nashville, Tennessee-based Kniery will serve a broad national client base, delivering innovative, data-driven strategies that help employers enhance performance, manage costs, and improve employee engagement.

"Mike brings a powerful combination of technical skill, analytics, and creative problem-solving to every client relationship," said Kevin Overbey, President, Alliant Employee Benefits. "His deep experience across both carrier and consulting environments gives him a unique ability to design self-funded programs that align with organizational goals and deliver measurable value."

Kniery is a 20-year veteran of the employee benefits industry, with extensive experience in both the health insurance carrier and consulting and brokerage arenas. He partners with large, multi-site self-funded employers across diverse industries, including financial services, law, healthcare, hospitality, and manufacturing.

His consulting capabilities span self-funded program ecosystem optimization, value-based care and direct-to-employer initiatives, mergers and acquisitions diligence, multiple employer trust programs, and employer reinsurance. Known for his use of analytics to develop customized, results-oriented strategies, Kniery helps employers achieve greater efficiency, cost savings, and employee engagement.



Michael Kniery
Alliant Insurance Services

Strategic Risk Solutions Launches SRS Titanium

Strategic Risk Solutions (SRS), the world's largest independent insurance company manager, has announced the launch of SRS Titanium - a specialized initiative delivering innovative captive insurance solutions for large and complex organizations.

According to a company statement, SRS Titanium will set a new benchmark for captive management and consulting support that combines our team's extensive experience and broad subject matter expertise, which will better address the needs of larger, more sophisticated clients.

"We are thrilled to launch SRS Titanium, which reflects our commitment to innovation and excellence in captive management," said Founder and SRS CEO, Brady Young. "Our dedicated team brings unmatched expertise and passion, ensuring that large and unique clients receive the highest level of service and strategic value. SRS Titanium is poised to redefine what's possible for Fortune 500 and global organizations."

In an industry built on profits and shareholders ...

We're still focusing on the things that matter to you.

SCRIPT CARE

As the longest-running, full-service independent PBM in the industry, our focus is solely on our clients and their members - and that's the way it's been for 38 years. Without pressure from shareholders, we're able to devote our efforts towards maximizing plan performance, prioritizing cost effectiveness and anticipating regulatory changes.

Head over to www.scriptcare.com to find out more!



Trust Sun Life to improve health access and risk management for your workforce

For over 40 years, Sun Life has been a trusted partner in risk management for self-funded employers. Now, we're furthering our commitment, focusing on improving the health and well-being for your employees and creating better access for members to the care they need most.

Enhancing Clinical 360

For select clients, Clinical 360+ combines the data-driven approach of identifying opportunities for care optimization and cost savings of Clinical 360, the program you know and love today included in all Sun Life Stop Loss policies, with the coordination and deployment of targeted health capabilities, preventative therapies, and care navigation – giving members access to the support they need, when they need it.

It's time to reconsider what you expect from your stop-loss partner. Let Sun Life support your business with innovative health solutions that prioritize access to quality care.*

Ask your Sun Life Stop-Loss Specialist about what is new at Sun Life.

*Hinge Health will be provided to eligible members at Sun Life's expense through the first policy year.

Sun Life is not responsible or liable for the care, services, or advice provided by Somatus, OptiMed Health Partners, or Hinge Health, and reserves the right to discontinue this service at any time.

Sun Life will collaborate with your TPA on eligibility and applicability of programs.

Health Navigator is provided by PinnacleCare. PinnacleCare is a member of the Sun Life Financial Inc. ("Sun Life") family of companies. PinnacleCare and its employees do not diagnose medical conditions, recommend treatment options or provide medical care, and any information or services provided should not be considered medical advice. Any medical decisions should be made only after consultation with and at the direction of the member's medical provider. Any person or entity who provides health care services following a referral or other service provided does so independently and not as an agent or representative of PinnacleCare.

Group stop-loss insurance policies are underwritten by Sun Life Assurance Company of Canada (Wellesley Hills, MA) in all states, except New York, under Policy Form Series 07-SL REV 7-12 and 22-SL. In New York, Group stop-loss insurance policies are underwritten by Sun Life and Health Insurance Company (U.S.) (Lansing, MI) under Policy Form Series 07-NYSL REV 7-12 and 22-NYSL. Policy offerings may not be available in all states and may vary due to state laws and regulations. Not approved for use in New Mexico.

© 2024 Sun Life Assurance Company of Canada, Wellesley Hills, MA 02481. All rights reserved. The Sun Life name and logo are registered trademarks of Sun Life Assurance Company of Canada. Visit us at www.sunlife.com/us.

BRAD-6503-ab

#1293927791 11/24 (exp. 11/26)

Robert Gagliardi to Lead SRS Titanium

Strategic Risk Solutions (SRS) announced the appointment of Robert Gagliardi as Chief Executive Officer of SRS Titanium, a specialized initiative delivering innovative captive insurance solutions for Fortune 500 and other global and complex organizations.

Based in Burlington, Vermont, Mr. Gagliardi brings with him a level of excellence well known throughout the global captive industry. Highly recognized for his influence in the captive industry over the past 25 years, Mr. Gagliardi has been named to the Captive Review Magazine Power 50 List and is greatly respected for his insight into industry trends and work with large global clients.



*Robert Gagliardi
SRS Titanium*

“We are very excited to have Bob join the SRS team in this leadership capacity,” said Founder and SRS CEO, Brady Young. “I have had great respect for Bob over the years and am confident he will be able to lead this new initiative to deliver exceptional value to SRS clients and drive growth for SRS.”

Formerly the Head of Global Captive Management at AIG, Mr. Gagliardi's experience in the formation, design and management of captive insurance companies on a global scale is exactly what SRS is looking for when it comes to spearheading the SRS Titanium initiative. Watch out for additional updates from SRS as we unveil other leadership for this exciting new initiative.

Gregg Lambert Joins ELMCRx/Caribou Systems

ELMCRx Solutions, Inc., a premier clinical services company, together with Caribou Systems, a leading pharmacy claims audit solutions provider within the ELMCRx family of companies, announced the appointment of Gregg Lambert as Senior Vice President of Sales and Marketing. This strategic addition



SPRING EXCHANGE

Advancing Business In The Self-Insurance Marketplace.

March 30 - April 1, 2026

New Orleans
Sheraton New Orleans

- Hot Topic Conversations
- Private Meeting Rooms Available
- Sources of Capital Meetings
- Coaching Workshop
- Vendor Showcases
- Women in SIIA Networking



Conference
Overview,
Registration &
Sponsorships

THIS is where the business of self-insurance gets done.



reflects both companies' continued growth trajectory and commitment to delivering innovative, high-quality PBM program services and driving better health outcomes.

Gregg Lambert will now lead sales and marketing initiatives for both organizations, bringing more than 30 years of experience in employee benefits, sales strategy, and client relationship management.

"I'm honored to join this family of companies at such an exciting stage in their evolution and growth," said Gregg Lambert. "Both ELMCRx and Caribou have built an impressive reputation for delivering clinical excellence and meaningful cost savings to plan sponsors. I look forward to partnering with the team to expand our market presence and help more organizations experience those results."

"We are excited to welcome Gregg to our leadership team at this pivotal time in our organization's growth," said Richard J. Fleder, Chief Executive Officer. "His expertise in market development will be instrumental as we continue to expand. This appointment underscores our commitment to building a world-class team that can drive innovation and excellence for our clients and partners."

MDI NetworX Announces Strategic Acquisition

MDI NetworX, a leading provider of technology-enabled business process solutions for the healthcare industry, announced the acquisition of Cobalt MedPlans (Clarity Performance Solutions) from Cobalt

hpi | a Leading National TPA

Making your new year resolutions **a reality**



In-house client support from implementation through renewal



Tailored point solutions and a la carte programs



The latest in navigation tools and concierge services



Member advocacy solutions



hpiTPA.com



Cheers to 2026!

HPI is excited to celebrate another year of empowering clients with tailored solutions that anticipate changing needs and provide clarity into benefits, letting you focus on what matters most.

Sending our self-insured community warm wishes and good health in the new year!

Health Solutions, a wholly owned subsidiary of Blue Cross and Blue Shield of Kansas City (Blue KC).

This strategic acquisition significantly expands MDI's U.S. operational footprint and strengthens its ability to deliver a full range of payer services — including claims processing, enrollment, and member and provider call center services — directly from U.S. delivery centers.

As part of the acquisition, approximately 250 U.S.-based employees from Cobalt MedPlans will join the MDI family, bringing MDI's total global workforce to more than 7,500. The transaction also adds two new Kansas locations — in Overland Park and Fort Scott — to MDI's existing U.S. operations centers. With a total of four domestic service delivery sites, complemented by its international centers, MDI is further strengthening its onshore delivery capabilities and enhancing support for payer clients across the country.

Recuro Health Recognized by TIME Magazine

Recuro Health, a leader in providing digital health solutions, has recently been awarded three prestigious awards in the healthcare landscape.

Chiefly, the company was named in TIME Magazine's World Top Digital Health Companies for innovation, growth, and measurable impact in virtual-first care. The company was also named among the Top 25 Digital Health Companies of 2025 by Healthcare Technology Report and recognized as a leading company in virtual care by Becker's Hospital Review.

"I'm glad these recent recognitions have brought additional awareness to our capabilities here at Recuro Health," said COO Michael Brombach. "We're making great strides in the digital health landscape, specifically around cost savings and patient outcomes, and I'm looking forward to building upon these awards as we continue on our important mission of Making Advanced Healthcare Accessible™." ■

SIIA NEW MEMBERS

CORPORATE MEMBERS – 1A

Tonya Crawford
VP, Captive Solutions
Crumdale Specialty
Lawrence, KS

Jason Hines
CEO & Co-founder
Gigasheet
Leesburg, VA

Abdulhamid Mohamed Ali
Chairman/CEO
Infrastructure Insurance CO
Milwaukee, WI

Jillian Palmer
Director of Operations & Strategic Partnerships
C2 Solutions
Grand Rapids, MI

Terence McCurren
Director, National Accounts
Neurotech Pharmaceuticals
Jefferson City, MO



2026 SELF-INSURANCE INSTITUTE OF AMERICA

BOARD OF DIRECTORS

CHAIRMAN OF THE BOARD*

Matt Kirk
President
The Benecon Group

CHAIRPERSON ELECT, TREASURER AND CORPORATE SECRETARY*

Amy Gasbarro
President
ELMCRx Solutions

DIRECTOR

Mark Combs
CEO/President
Self-Insured Reporting

DIRECTOR

Orlo "Spike" Dietrich
Operating Partner
Ansley Capital Group

DIRECTOR

Jeffrey L. Fitzgerald
Managing Director, SRS Benefit
Partners
Strategic Risk Solutions, Inc.

DIRECTOR

Mark Lawrence
President
HM Insurance Group

DIRECTOR

Matthew Smith
Managing Director
Risk Strategies

DIRECTOR

Beth Turbitt
Managing Director
Aon Re, Inc.

VOLUNTEER COMMITTEE CHAIRS

Captive Insurance Committee

George M. Belokas, FCAS, MAAA
President
Beyond Risk

Future Leaders Committee

Erin Duffy
Director of Business Development
Imagine360

Price Transparency Committee

Christine Cooper
CEO
aequum LLC

Cell and Gene Task Force

Ashley Hume
President
Emerging Therapy Solutions®

* Also serves as Director



SIEF

Self-Insurance Educational Foundation

2025 BOARD OF DIRECTORS

SIEF Chairman Emeritus

Nigel Wallbank
President
New Horizons Insurance
Solutions

SIEF President

Dani Kimlinger, PhD, MHA,
SPHR, SHRM-SCP
Chief Executive Officer
MINES & Associates, Inc

Directors

Les Boughner
Chairman
Advantage Insurance
Management (USA) LLC

Jonathan Socko
Senior Vice President
East Coast Underwriters, LLC

Matt Hayward
Office President
Ryan Specialty Benefits

Elizabeth Midtlien

Ringmaster®

UNLOCK THE POWER OF CONNECTIONS!

Your All-in-One Hub

Simplify how you connect with partners across the PBM and, Stop-Loss ecosystem.

LinQ®

Quote-LinQ® **Smart-LinQ®** **Pro-LinQ®**

Step Into the Ring with Ringmaster! 330 648 3700 rmtsales@ringmastertech.com www.ringmastertech.com