

NEWS FROM SIIA MEMBERS



JUNE 2026 MEMBER NEWS

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

Coastal Administrative Services Teams up With Point C

Point C, a national independent third-party administrator (TPA), announced a strategic expansion with Coastal Administrative Services (CAS), one of the Pacific Northwest's fastest-growing TPAs. These two deeply aligned organizations are united by a shared commitment to high-touch customer service and customized health plan solutions that help clients and their members navigate the complexities of healthcare with confidence and compassion.

This partnership expands Point C's presence on the West Coast, establishing operations in the Pacific Northwest while simultaneously providing Coastal with greater resources and access to Point C's full suite of in-house product offerings, accelerating the value for employers and the members they serve.

"From our first conversations, it was clear that Point C and Coastal share the same philosophy in how we serve our members," said Jason Barth, President and Owner of CAS. "We both have a member-first approach, investing in the right people, processes, products, and technology to deliver genuinely effective, cost-conscious health plan solutions. This partnership allows us to continue growing without compromising what makes Coastal unique."

“The culture and core values that Coastal have built mirrors what we’ve worked hard to create at Point C,” said Ben Frisch, CEO of Point C. “That alignment, plus the shared importance of supporting our plan sponsors and their members, made this decision cohesive and seamless, and it’s what excites me most about this next chapter of growth for both organizations.”

“CAS has been on a tremendous growth trajectory, and a key driver of that has been our ability to bring tailored, high-quality solutions to our clients,” said Kasha Ozog, CEO of CAS. “It is an exciting and pivotal time for CAS, and by combining forces with Point C, we can now deliver these solutions at an even broader scale and scope. We will also remain an independent TPA which allows us to continue providing the same high level of quality and service that clients have come to rely on.”

“Point C has been growing rapidly and expanding its reach across the country, and CAS brings a well-established presence with strong relationships, allowing us to extend our distribution in a meaningful and intentional way,” said Bob Wolfkiel, Chief Growth Officer of Point C. “The growth opportunity here is substantial, and we’re excited to pursue it together.”

The acquisition of Coastal further solidifies Point C’s commitment to growth and innovation within the TPA and cost-containment spaces, with both companies well-positioned to meet the current and future demands of the market.



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ANGLE HEALTH NAMES TEXAS-BASED SALES EXECUTIVE



Scott Ferguson
Angle Health

Scott Ferguson is a seasoned healthcare and benefits sales executive with over 30 years of experience driving growth in a variety of markets. He has been appointed as Vice President of Sales for Texas at Angle Health.

Previously, Scott was Executive Vice President of Sales at Marsh McLennan Agency, where he led multiple teams across Central Texas and drove strong revenue growth. He has also held senior leadership roles at Blue Cross and Blue Shield of Texas and BCBSNC, managing large and national group sales organizations and implementing strategic benefit solutions for complex clients.

Scott spent a decade at UnitedHealthcare, rising to Vice President of Sales and Account Management. He began his career at Aetna Health Plans, consistently recognized as a top sales leader.

ZENITH EXPANDS PROGRAM MANAGEMENT CAPABILITIES

Zenith Risk Strategies, a Texas-based managing general underwriter focused on medical stop-loss, is positioning itself as a program manager built around underwriting discipline, clinical oversight, and captive integration.

Founded in 2024 and led by CEO Thomas Wagner, the Austin-based firm targets the self-funded employer market. In particular, it works with brokers, captives, and advisors to structure stop-loss programs with an emphasis on long-term stability rather than short-term pricing cycles.

More broadly, the company frames its model as a departure from traditional stop-loss. Specifically, it aims to align incentives across underwriting, claims management, and employer outcomes. To support this, its approach combines data-driven pricing, clinical-led claims review, and cost containment strategies designed to reduce volatility at renewal.

At the core of the model, Zenith's offering centers on five components:

- Strategic pricing
- Advanced underwriting using clinical and analytics data
- Physician-led review of high-cost claims
- Cost containment programs
- Surplus retention strategies tied to long-term performance

In addition, the platform integrates with captive structures. As a result, employers and groups can retain underwriting gains while maintaining transparency into program performance.

BHSI Announces Three New Vice Presidents

Berkshire Hathaway Specialty Insurance (BHSI) announced that it has named Ford Coacher as Vice President, Taft Hartley; Chris Slezak, as Vice President, Employer Stop-Loss Sales, U.S. West; and Bill Bixler as Vice President, Employer Stop-Loss Sales, U.S. East.

“BHSI’s financial strength, long-term view and CLAIMS IS OUR PRODUCT philosophy has really resonated in the employer stop-loss (ESL) marketplace,” said Phil Gardham, President, NA Accident & Health, BHSI. “These well-deserved promotions are designed to recognize the work of our talented professionals and provide strong support for our continued growth in ESL—including the Taft Hartley space.”

Ford Coacher joined BHSI in 2024 as Assistant Vice President, bringing more than a decade of insurance industry experience with a focus on the Taft-Hartley and multiemployer health plan market. In his new role he will oversee the ongoing expansion of BHSI’s Taft Hartley ESL business for self-funded multi-employer union health plans.

Chris Slezak joined BHSI in 2022 and was previously Regional Vice President, for the South-Central Region. He has more than two decades of insurance industry experience. In Chris’s new role, he will oversee sales of BHSI’s ESL solutions for U.S. West which will include the Southwest, Northwest Regions, in addition to the South Central.

Bill Bixler joined BHSI in 2017 and was previously Regional Vice President for the Northeast & Mid Atlantic. He has more than three decades of insurance industry experience. In Bill’s new role, he will oversee sales of BHSI’s ESL solutions for U.S. East which will include the Midwest and Southeast Regions, in addition to the Eastern and Midwest.

AMY MATTINGLY TO LEAD GROUP BENEFITS DISTRIBUTION AS NATIONWIDE



Amy Mattingly
Nationwide

Lindsey Murray, president of Nationwide Group Benefits, shared that Amy Mattingly will lead the Group Benefits Distribution team to focus on stop-loss.

In her new role, Mattingly is responsible for developing, implementing and leading the sales and distribution strategy for Nationwide Group Benefits, with a focus on stop-loss and program managed solutions for small and mid-sized businesses.

“Amy has consistently shown courageous leadership in navigating the financial industry’s evolving landscape while delivering growth,” said Murray. “Her proven leadership skills along with her ability to develop strong relationships with sales partners will allow Nationwide’s stoploss distribution to grow and thrive.”

Executive Sales Team Grows at Vālenz

Vālenz Health® announced that five experienced business leaders have joined its executive sales team to support the advancement of smarter, better, faster healthcare for clients and partners.

Joe Calabretti, Lou Fiscella, Kenny Fritz, and Jeff Wunderlich will each serve as Vice President of Broker Sales, while Adam Drake steps into the role of Vice President of Digital Solution Sales. Together, they bring unparalleled experience in the healthcare industry to the Vālenz team and will play a pivotal role in driving growth for clients through strategic partnerships and plan design innovation.

“As we enter a new phase of growth at Vālenz, we are thrilled to add such a wealth of experience and knowledge to our sales team,” said Kevin O’Donnell, Executive Vice President of Solution Strategy and Expansion at Vālenz. “The addition of these five leaders strengthens our ability to provide the highest level of service and guidance to employers and members beyond the traditional renewal season, ensuring yearlong support for our most valued partners.”

As part of the sales team, these five leaders will also leverage their experience in the industry and bold strategic thinking to help clients and partners harness the full potential of the entire Vālenz platform to optimize the cost, quality, and utilization of healthcare for everyone.

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Zelis Announces New CSO and CRO Appointments

Zelis, a leading provider of healthcare technology solutions, announces the appointment of Peter Durlach as Chief Strategy Officer and the promotion of Matthew Krawse to Chief Revenue Officer. Together, they will help advance Zelis' mission to modernize the healthcare financial experience for payers, providers, and members.

"Peter and Matthew bring deep experience and complementary perspectives that will help us move faster, stay focused on where we can lead, and deliver even greater value for our clients," says Amanda Eisel, CEO of Zelis. "In an evolving healthcare landscape, these leaders will play a key role in how we support clients today while sharpening our vision for the future."

As Chief Strategy Officer, Durlach will lead the creation of an enterprise-wide function focused on accelerating long-term growth, strengthening Zelis' market position, and expanding the value the company delivers to clients.

He will build and lead a coordinated team spanning enterprise, product, and development capabilities. This group will help shape company strategy, advance AI-driven capabilities, strengthen cross-functional alignment, and turn business priorities into actionable outcomes across the organization.

Durlach brings more than three decades of experience building and scaling healthcare technology businesses. Most recently, he served as Corporate Vice President and Chief Strategy Officer for Health & Life Sciences at Microsoft, where he helped guide the company's strategic direction and portfolio across the healthcare industry.

Krawse has spent the last 10 years at Zelis, most recently as Senior Vice President of Growth, focusing on the Zelis Payments Optimization business. As Chief Revenue Officer, he will lead the company's Sales and Client Management organization. He brings to this role a deep understanding of the complex healthcare market, client needs and Zelis' differentiated solutions.

Acrisure Restructures Key Division

Acrisure Re, the reinsurance division of global fintech Acrisure, integrates its capital and captives division into a single platform.

The integration brings together more than 275 captive specialists across North America and Bermuda. It combines the firm's established captive business with its specialist reinsurance brokerage capabilities.

The new division, Acrisure Re Capital and Captives, is led by Seth Denson, head of captives, who reports to Simon Hedley, global CEO of Acrisure Re.

The move is a strategic step to unlock the next phase of growth. Currently, almost 70 per cent of the business focuses on the US life and health (L&H) segment, where alternative and self-insured medical plans are among the fastest-growing areas of the US medical insurance market.

The remaining 30 per cent operates across property and casualty (P&C), an area targeted for expansion within the Acrisure Re platform. In the P&C space, the division intends to pursue growth across group and single-parent captives, focusing on sourcing opportunities, executing reinsurance placements, and generating new business for trading partners.

Beyond Risk Launches Beyond Health Partners

Beyond Risk announced the official launch of Beyond Health Partners, a unified health benefits funding specialist that brings together stop-loss, captive, and cost containment businesses under one integrated platform. The name “Beyond Health Partners” reflects the organization’s commitment to collaboration and its belief that working as an extension of each partner across brokers, employers, TPAs, and vendors is key to delivering better outcomes.

By unifying industry-leading organizations SL Management Partners, LLC (SLMP), Captive Solutions & Options, and the Beyond Health captive team (a BevCap Management program) into a single platform, Beyond Health Partners supports both traditional and alternative health benefits funding strategies while managing more than \$175 million in gross written stop-loss premium for brokers and mid-market employers nationwide.

The integrated platform supports the full lifecycle of health benefits funding, including stop-loss underwriting and program management, captive strategy and participation, claims monitoring and cost-containment coordination, and renewal planning and long-term risk management.

“This launch marks an important step in bringing our capabilities together in a more intentional way,” said Steve Solomon, President of Beyond Health Partners. “With stronger alignment across our organizations, we are better positioned to support carrier and client needs through a more connected and effective operating model.”

Boon-Chapman President Recognized as Innovation Leader

Boon-Chapman announced that its president, Kari L. Niblack, has been named to the HIPN GTM 100, April 2026 Edition, a distinguished list recognizing the go-to-market leaders driving innovation and growth across the healthcare payer and services ecosystem. The recognition was announced by Healthcare BizDev, publisher of Health Insurance Plan News (HIPN).

“Self-funded healthcare is no longer a niche strategy reserved for large corporations. It is becoming the smarter choice for employers of all sizes who want transparency, control, and better outcomes for their people,” said Niblack. “Being recognized alongside so many exceptional leaders in this space is an honor, and it reinforces what we work toward every day at Boon-Chapman: building smarter health plans that actually serve the members they are designed for.”



*Kari Niblack
Boon-Chapman*

Karl Fry to Head Producer Relations at Skyward A&H

Skyward Accident and Health is pleased to announce the appointment of Karl Fry as Vice President of National Producer Relations. In this strategic role, Fry will spearhead the development and management of key national producer partnerships, working in close alignment with Skyward’s Regional Sales offices to drive nationwide growth.

Fry brings over 30 years of experience across the healthcare insurance and reinsurance sectors. He possesses a deep technical mastery of employer stop-loss, provider excess of loss, medical excess,



*Karl Fry
Skyward Accident and
Health*

and HMO reinsurance. Throughout his career, he has earned a reputation for engineering creative, results-oriented programs that empower clients and brokerage partners to navigate intricate risk landscapes while meeting critical financial and strategic milestones.

Before joining Skyward, Fry held several executive leadership roles, including Vice President of Business Development at RGA and Vice President at Guy Carpenter.

“Karl’s extensive tenure and specialized background in the Employer Stop-Loss market provide him with an acute perspective on the sophisticated and ever-shifting insurance ecosystem,” said Mike Remeika, Divisional President of Skyward A&H. “By bringing an industry veteran of Karl’s caliber into the fold, Skyward reinforces its commitment to delivering elite expertise and high-touch service to our national partners. We are thrilled to have him leading our producer relations.”

Leading Edge Names Technology Executive

Leading Edge Administrators (LEA), a family-owned independent Third-Party Administrator, announced a strategic investment in its technology leadership, platform, and infrastructure to support the next generation of self-funded benefits administration. As part of this initiative, the company has appointed Doug Stewart, an industry veteran, as Chief Technology Officer.

This move reflects LEA’s long-term commitment to building a more agile, scalable, and future-ready operating model, one that combines advanced technology with the high-touch service its clients rely on.

Stewart brings more than 20 years of healthcare technology experience, including leadership roles at one of the nation’s largest health insurers, where he led large-scale digital transformation initiatives. Throughout his career, he has worked at the intersection of technology, operations, and business strategy, driving improvements in system performance, data accessibility, and user experience. At LEA, he will play a central role in shaping the company’s technology roadmap and advancing its platform capabilities.

“LEA holds a distinct advantage because we aren’t burdened by the technical debt that often comes with acquisition-based growth,” Stewart said. “Our size and structure allow us to be flexible and intentional in how we build. That means we can focus on solving real business problems and delivering outcomes that matter to our clients.”

According to a company statement, A key focus of LEA’s technology strategy is the use of smarter automation to enhance, not replace, human service. By streamlining repetitive, manual administrative processes, the company enables its teams to operate more efficiently while maintaining the high level of responsiveness and personalization that clients expect. This approach ensures that automation supports faster turnaround times and improved accuracy, while freeing up internal teams to focus on complex, high-value interactions with brokers, employers, and members.■



*Doug Stewart
Leading Edge*

SELF-FUNDING PIONEER, STEVE STUCKY, PASSES



Steve Stucky

September 25, 1936 - May 9, 2026

Steven P. Stucky, CLU, founder of S. P. Stucky Company, Inc., a stop loss MGU based in Lafayette, IN, died on May 9, 2026. His wife and business partner, Pat Stucky, had passed years earlier.

"Steve was an early supporter of SIIA during its founding in 1981 and subsequently served the association with membership on several committees, and later as an SIIA board member and officer. Steve rose to the position of president and it's chairman of the board. Steve also led the charge to create the Self-Insurance Educational Foundation, Inc. (SIEF) a 501(c)(3) non-profit that developed industry scholarship programs and

publisher of a variety of research documents, best practices, etc. He served as Chairman for several years," said Jim Kinder, co-founder/Executive Director/CEO of SIIA (1981-2008).

"Steve was known to many industry leaders as the inventor of the stop-loss insurance product to cap losses for employer sponsored self-insured benefit plans," added Kinder. "This new product (developed back in the 70's along with federal legislation passed in 1974 known as ERISA fueled the growth of self-insurance and remains the cornerstone of legislative authority today. Steve's innovations in product design within the excess & reinsurance market was and throughout his career a great service to the industry" Kinder added. "Steve will be truly missed both as an industry legend and a close personal friend. Steve never really retired from the industry and remained active in his normal quiet way. Steve and I remained friends to this day, some 45 years, and I will certainly miss our frequent visits and telephone calls. RIP Steve."

"Steve provided a wonderful model for me to serve the self-funded industry," said Ernie Clevenger, publisher of this Newsletter. "When I was a young stop loss underwriter, Steve taught me valuable techniques how best to analyze risks. Later when I followed him as president of SIIA, Steve provided valuable guidance where the organization needed to focus."

Steve received a B.S. Degree in Economics from Butler University in 1959 and a Chartered Life Underwriter (CLU) Degree from The American College of Life Underwriters, Bryn Mawr, PA in 1966. He began his insurance career in 1957 and served as an underwriter, officer and member of the board of directors of a number of outstanding U.S. insurance companies. In 1981, he formed a Managing General Underwriting firm called the S. P. Stucky Company, Inc. in West Lafayette and operated it successfully until he sold it and retired in June of 2000.

Services for Steve were held in his hometown of Lafayette, Indiana at Soller-Baker Funeral Home on May 23, 2026. You may leave messages/condolences to family, share memories, and view Steve's full obituary at: <https://soller-baker.com/obituary/steven-p-stucky-clu/>

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