NEWS
FROM SIIA MEMBERS

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.

Tim O'Brien Named New President at HPI

Health Plans, Inc. (HPI), a leading national TPA of self-funded benefits and subsidiary of Point32Health, has announced the appointment of Tim O'Brien as president. O'Brien brings more than 25 years of experience across payer, third-party administration, PBM, care delivery, and surgical network organizations. Interim President Glenn MacFarlane worked closely with O'Brien to ensure a smooth leadership transition.

Tim O'Brien
Health Plans, Inc. (HPI)

"Tim is an accomplished leader with deep experience across the healthcare ecosystem and a proven track record of driving growth and innovation. His expertise in building high-performing organizations and delivering client-focused solutions makes him the right leader for HPI's next chapter," said Marti Lolli, executive vice president of markets & chief growth officer at Point32Health. "We're excited to welcome Tim and confident that he'll further strengthen HPI's position as a trusted partner to brokers and employers nationwide."

"I'm excited to join HPI and build on the strong foundation already in place," said O'Brien. "The organization has established a reputation for delivering flexible, outcome-focused solutions. I look forward to working with the team to advance operational excellence, accelerate growth, and expand our impact across the healthcare ecosystem."

O'Brien joins HPI from Vitori Health, a vertically integrated health plan platform, where he served as chief executive officer. He led the company through a period of significant growth, culminating in a successful exit to Global Excel Management in 2025. Prior to joining Vitori Health, O'Brien served as division president at Blue Cross Blue Shield of Kansas City and as president and COO of Nueterra Companies.

Vālenz Announses New CEO

Vālenz Health® has announced the appointment of Vince Cole as its new Chief Executive Officer.

Cole draws on more than three decades of executive leadership experience spanning healthcare services, insurance, and global enterprise transformation. Most recently, he served as Chief Executive Officer of Ontellus, where he led the nation's largest technology-enabled medical and legal records retrieval business. Prior to that he served as CEO, Americas, of professional services firm Charles Taylor, and CEO, Americas, of publicly traded Crawford & Company, the world's largest provider of claims management solutions to the risk management and insurance industries.

Vince Cole
Vālenz Health®

"Vālenz is entering an exciting new phase of growth from a position of strength and confidence in the vision," said Hank Mannix, Investment Partner at Kelso & Company, the private equity sponsor of Vālenz. "Vince brings deep experience operating at scale, a proven ability to drive organic growth, and a strong track record of building high-performance teams in dynamic and complex industries."

"I am honored to join Vālenz at such a pivotal moment," Cole said. "The company has built a strong foundation, and I look forward to working with the team to expand impact, strengthen partnerships, and continue delivering on its mission to support strong, vigorous, and healthy lives for all."

Cole's appointment follows an intentional and thoughtful succession process aimed at positioning the company for its next phase of growth and expansion. He succeeds Rob Gelb, who will transition to the role of Non-Executive Chairman of the Vālenz Board of Directors..

MedWatch Expands it Business Development Team

Kari-Ann Karaffa
MedWatch

MedWatch is pleased to announce the addition of Kari-Ann Karaffa as Vice President of Business Development.

Karaffa brings more than 15 years of experience across healthcare technology and employee benefits sectors. She is recognized for advancing business development initiatives, strengthening client relationships, and delivering long-term value for partners.

Most recently, she served as a Senior Client Success Manager, where she oversaw key Reference-Based Pricing partnerships, including a large national book of business. In this role, she partnered closely with employer groups nationwide to support strong service delivery and positive client outcomes. Earlier in her career, Karaffa held multiple Vice President of Business Development roles, leading strategic growth efforts and building high-impact relationships across the industry.

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30–70%

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100%

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Day 1

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We plug into your existing formulary and plan design · no rip-and-replace. Full cold-chain logistics, temperature-controlled shipping, and compliance documentation on every order. DIN-to-NDC matching confirms equivalence.

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The specialty tool your clients haven't seen yet.

Canadian sourcing is the international option you can defend at the regulatory level · and prove to skeptical CFOs. Bring 30·70% savings to your next renewal conversation. Measurable ROI from day one.

REGULATION

Licensed Canadian Rx

DIN-matched to every U.S. NDC.

LOGISTICS

Cold Chain End-to-End

Temp-controlled, pharmacy to member's door.

VERIFICATION

Pharmacist-Reviewed

Licensed Canadian pharmacist on every order.

COMPLIANCE

Audit-Ready Docs

Full documentation with every shipment.

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Get a Cost-Savings Review Today

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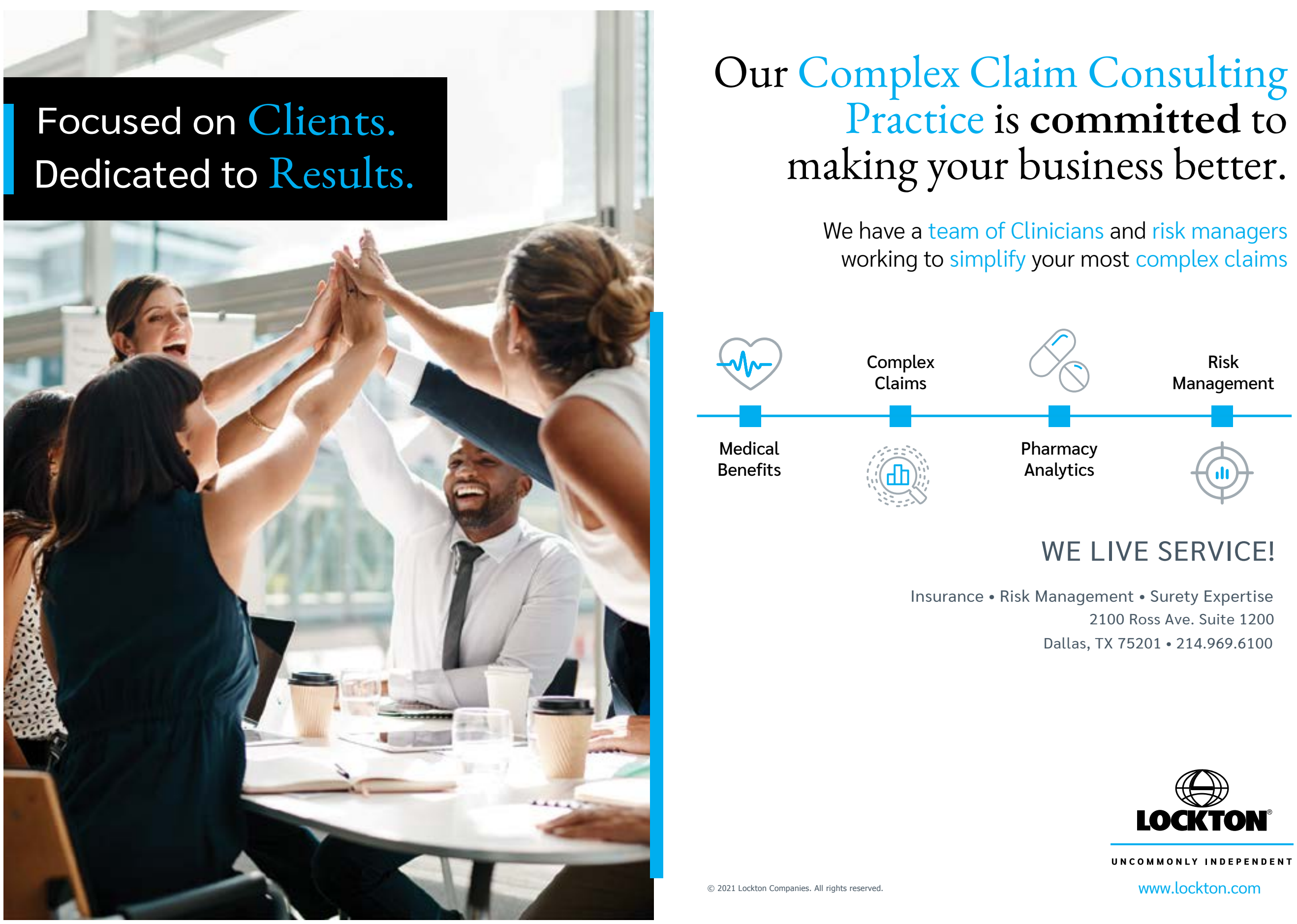
"Kari-Ann's deep industry relationships and long-standing connection to MedWatch make her a natural fit for this role," said Sally-Ann Polson, MedWatch President and CEO. "She brings a thoughtful, partner-first approach and a strong understanding of the market that will help us continue to expand and strengthen the value we deliver to our clients."

Reflect Health Appoints New Operations Executive

Be-bi Singh
Reflect Health

Reflect Health, the Benefits Hub built for modern healthcare programs and strategic partners, announced the appointment of Be-bi Singh as Senior Vice President of Operations and Performance. Singh brings decades of healthcare operations leadership experience, including extensive expertise managing complex third-party administrator (TPA) implementations, operational transformations, and large-scale healthcare initiatives.

In her role, Singh will lead operational strategy and performance optimization initiatives across Reflect Health's growing platform. Her focus will be on strengthening health plan integrations, streamlining vendor connectivity, enhancing operational efficiency, and driving improved outcomes for clients and partners.



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Why work with Nationwide®?

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**Get support and expertise where you need it most.
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The Self-Funded Program through Nationwide provides tools for employers owning small to midsize businesses to establish a self-funded health benefit plan for their employees. The benefit plan is established by the employer and is not an insurance product. Stop loss insurance policies are underwritten or reinsured by Nationwide Life and Benefits Insurance Company. Refer to nationwide.com/stoplossdisclaimer for details. Product availability and specific provisions may vary by state.

GHM-0349AO (06/26)

"Be-bi brings an exceptional combination of operational leadership, strategic insight, and deep industry expertise," said Vincent Esposito, CEO of Reflect Health. "We are excited to officially welcome her into this leadership role. Since joining Reflect Health earlier this year, she has already helped drive meaningful operational improvements, strengthen execution across teams, and elevate the experience we deliver to our clients and partners. Her experience navigating complex TPA implementations and large-scale healthcare operations has made an immediate impact."

Prior to joining Reflect Health, Singh led operational and implementation initiatives across major healthcare organizations – including most recently at Anthem – where she built a strong reputation for improving service delivery models, managing large-scale integrations, and developing high-performing operational teams.

Custom Design Benefits announced that Julie D. Mueller, President and Chief Executive Officer, has completed the purchase of the remaining outstanding ownership of the company from its previous investors, resulting in full private ownership by Mueller.

Julie Mueller
Custom Design Benefits

Founded in 1991, Custom Design Benefits is an independent third-party administrator that partners with employers and their broker partners to design, implement, and manage customized benefits strategies. The firm is known for its client first approach, innovative thinking, and long-term relationships built on trust, transparency, and measurable results.

Mueller has led Custom Design Benefits since 2016 and has served as CEO throughout a period of sustained growth, expansion of services, and deepened client impact. The completion of this transaction marks a significant milestone in the company's evolution and reinforces Mueller's long-term commitment to the firm's mission, clients, and employees.

IS Benefits Strengthens Its Marketing Team

Shale Cooper
Integrated Solutions

Integrated Solutions for Benefits and Insurance Services (IS Benefits), a leading provider of stop-loss marketing and cost containment solutions for self-funded employers, is pleased to announce the appointment of Shale Cooper as Director of Stop-loss Marketing.

In this role, Shale will lead the company's stop-loss marketing initiatives, overseeing the RFP and renewal process while strengthening strategic relationships with brokers, consultants, third-party administrators (TPAs), carriers, and managing general underwriters (MGUs). His expertise will further enhance Integrated Solutions' consultative approach to stop-loss placement, helping partners navigate an increasingly complex and rapidly evolving market.

Most recently, Shale served as Director of Stop-loss Sales at a group medical stop-loss captive, where he developed and led sales and go-to-market strategy. Prior to that, he held integral positions at Health Care Service Corporation (HCSC), where he helped strengthen one of the nation's largest direct writers of stop-loss coverage through strategic initiatives, sales enablement, and market development. Earlier in his career, Shale served as a Stop-loss Specialist at Sun Life, cultivating broker and consultant relationships through a consultative approach centered on education and partnership.

"Shale's experience spans nearly every facet of the stop-loss ecosystem—from consulting and carrier relationships to captive strategy and employer advisory work," said Tyler Benware, Chief Executive Officer of Integrated Solutions. "As healthcare costs continue to rise and the stop-loss market becomes increasingly challenging, our partners need more than transactional marketing support. They need a strategic advisor who understands risk, asks the right questions, and helps uncover opportunities to improve outcomes. Shale embodies that approach, and we're thrilled to welcome him to the team."

Clay Kelley Joins QBE Captive Team

QBE North America has appointed Clay Kelley as assistant vice president, captives, where he will work with advisers and employer groups on healthcare cost strategies and solutions.

Clay Kelley
QBE North America

Kelley brings more than 25 years of experience in self-funded healthcare benefits, with expertise spanning the administration of self-funded plans, stop-loss underwriting, and products including captives and consortiums. He describes himself as a trusted adviser to brokers seeking solutions for clients that are already self-funded or are looking to move to a self-funded platform from fully insured arrangements.

He joins from Blackwell Captive Solutions, where he served as assistant vice president of sales, captives. Before that he held the role of regional vice president at ClearPoint Health, and earlier sales leadership positions at Crescent Health Solutions, Maestro Health and Planned Administrators. His earlier career included stop-loss and client services roles at HM Insurance Group and Key Benefit Administrators.

Brad Feldman Joins C&F Stop-Loss Underwriting Team

Crum & Forster's (C&F) Accident & Health Division announces that Brett Feldman has joined the company as Vice President of C&F Stop-loss Underwriting within the Division's Medical Business Unit. In this role, Feldman will shape the growth strategy for C&F's stop-loss business, with oversight of product development, portfolio management, and strategic initiatives.

Brett Feldman
Crum & Forster
Accident & Health

"Brett brings a rare blend of underwriting discipline, strategic thinking, and team leadership to Crum & Forster," said David Webb, Senior Vice President, C&F Stop-loss within the A&H Division's Medical Business Unit at Crum & Forster. "His extensive experience in the stop-loss space will be invaluable as we continue to expand our capabilities and deepen our market presence. We are excited to welcome Brett and look forward to the positive contributions he will bring."

A seasoned industry veteran, Feldman has spent his career developing high-performing teams and executing growth strategies across the stop-loss and captive markets. He joins C&F from Captive Resources, Inc., where he served as Head of MSL Underwriting and led the build-out of the company's Health Solutions Underwriting function

"I am honored to join the C&F Stop-loss team at such an exciting time for the business," said Feldman. "Crum & Forster's commitment to disciplined underwriting, thoughtful growth, and strong client and broker partnerships aligns closely with my own approach. I look forward to working with the team to expand our capabilities, deliver even greater value to our partners, and continue building on the strong foundation already in place."

Skyward Names New Head of A&H Actuarial

Skyward A&H is pleased to announce the appointment of Harry Gong, FSA, CERA, MAAA, as Senior Vice President, Head of A&H Actuarial.

Harry Gong
Skyward Specialty

Harry brings approximately 18 years of distinguished industry experience, having previously held key leadership positions at Aon, RGA, and UnitedHealthcare. His robust credentials and extensive expertise in the reinsurance sector provide the perfect strategic blend to support Skyward's growing medical stop-loss business.

"Our ability to provide our clients with top-notch service stems from building a leadership team of the industry's top talent, and Harry exemplifies that standard," said Mike Remeika, Divisional President of Skyward A&H. "He comes to us with an exceptional reputation, and his actuarial insight is second to none. His broad knowledge and deep expertise will help us further strengthen our market position and deliver even greater value to our clients."

Harry expressed his enthusiasm for role stating:

"I am thrilled to join the talented team at Skyward. I have long admired the company's dynamic momentum in the market and their unwavering commitment to a client-focused philosophy. I look forward to leveraging my experience to drive innovative solutions and contribute to the continued growth and success of the A&H division."

Greg Arms to Advise EvolTech

EvolTech is pleased to announce the appointment of Greg Arms as Senior Strategic supporting the company's continued growth and market expansion.

Greg is a 40-year insurance industry veteran with deep experience in the Life, Health, and Pension insurance sectors, both in the US and internationally. Over the course of his career, he has held senior leadership roles at the industry's foremost insurance carriers and brokers. In his advisory role, he will work closely with EvolTech's leadership team to provide strategic insight into market trends, operational challenges, and the evolving needs of organizations within the insurance and healthcare ecosystem.

"We are thrilled to welcome Greg to EvolTech as a Senior Strategic Advisor. His strategic perspective, global experience, and strong relationships across the insurance and healthcare-related sectors will help EvolTech better address the evolving needs of organizations across industries and geographies," commented Thulasidharan LG, CEO, EvolTech.

MINES and Associates is One to Watch in Colorado

Dani Kimlinger
MINES and Associates

"I'm excited to share that MINES and Associates was recognized as a 2026 Colorado Companies to Watch winner in the Empowering Colorado category," said Dani Kimlinger, PhD, MHA, SPHR, SHRM-SCP, Chief Executive Officer and Partner @ MINES and Associates.

"We had the privilege of accepting this award on behalf of our team. The metrics behind each organization tell an important story, but behind every number are people who care deeply about serving others."

For more than 45 years, MINES has been committed to supporting the well-being of individuals, families, workplaces, and communities. As the needs of those we serve continue to evolve, I am especially proud of how our team embraces innovation while staying true to our mission and values.

Sarah Novak promoted at zakipoint Health

Sarah Novak
zakipoint Health

zakipoint Health announced that Sarah Novak has been promoted to Director of Customer Success.

In her expanded role, Sarah will lead our Customer Success strategy, oversee client retention, drive implementation oversight, and ensure that every customer and partner realizes measurable outcomes from zakipoint Health's platform and services.

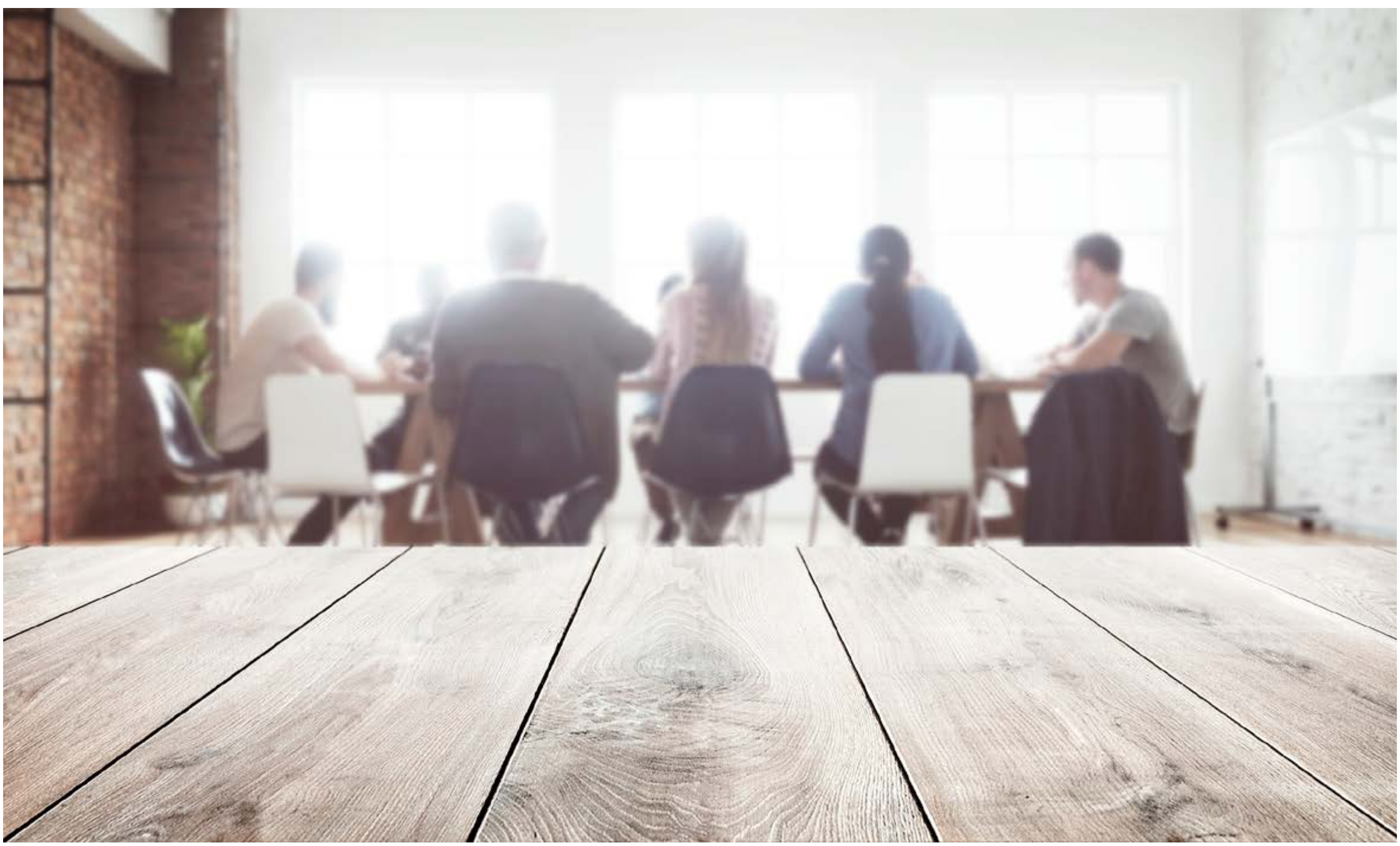
Merger of Two MGUs Creates Jencap A&H

International Assurance of Tennessee Inc. and Aran Insurance Underwriters, two highly respected stop-loss managing general underwriters, announced the combination of their operations under a new unified brand—Jencap A&H Insurance Solutions (Jencap A&H). The newly aligned platform brings together deep underwriting expertise, national reach, and expanded capabilities to better serve brokers, carriers, and clients.

"This is a meaningful step forward for our business and our partners," said the President of Jencap A&H, Scott Eastland. "Jencap A&H will continue to build on the strong reputations of both organizations while delivering a unified, forward-looking platform designed for growth."

Together, the combined operations will deliver broader market access, enhanced program flexibility, and deeper underwriting resources—all backed by the scale and strength of the Jencap platform. By aligning best-in-class teams and capabilities, Jencap A&H is positioned to accelerate growth while continuing to deliver the service, responsiveness, and expertise brokers rely on.

"Each legacy company brings more than 40 years of experience in the medical stop-loss industry," said Brandon Baisden, Chief Revenue Officer at Jencap A&H. "This next chapter creates a stronger, more scalable platform for our TPA's and brokers—expanding geographic reach, enhancing underwriting capabilities, and unlocking new opportunities for partners nationwide."



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