

NEWS

FROM SIIA MEMBERS



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

DIAMOND MEMBERS

TPAC CELEBRATES 20 YEARS OF SPAGGREGATE, THE FIRST TRUE LEVEL-FUNDED STOP-LOSS OFFERING ON THE MARKET

Minneapolis, MN -- TPAC Underwriters, Inc. (TPAC), a leading Managing General Underwriter focused on writing profitable business through creative reinsurance solutions, is excited to announce 20 successful years of its Spaggregate underwriting solution. Spaggregate, TPAC's proprietary level-funded stop-loss product that is a blend of traditional specific/aggregate stop-loss and a fully insured program, is considered to be the original level-funded, aggregate-only stop-loss product and the first of its kind in the nation.

TPAC underwrote its first Spaggregate case in May 1999, delivering a truly level-funded product that ensured predictability of claims costs and the lowest maximum cost to groups—all without lasers. Throughout the past two decades of utilizing this innovative program, TPAC has underwritten more than 2,000 Spaggregate policies for over 750 employer groups.

Originating from a desire to formulate a better way to successfully underwrite low benefit plans, TPAC designed Spaggregate to help employers by establishing a fixed monthly budget for claims coverage within a client's self-funded health plan. With foundational features including low maximum cost, no lasers, creativity in plan design, transparency, control and flexible contracts, Spaggregate offers the ideal



combination of predictability, savings and control to meet every client's benefits needs.

Patrick Sanders, the President of IMS (Insurance Management Services), says, "The Spaggregate product has been a game changing funding mechanism for our clients since 2004, particularly those coming from the fully insured market."

"We at TPAC feel an incredible sense of accomplishment with the success and savings our clients have experienced using our Spaggregate product throughout the past 20 years," said Michael Meloch, President of TPAC. "Our goal has always been to provide unique underwriting solutions, and we plan to continue to drive innovation in the reinsurance market with Spaggregate and our other products designed to not only meet our clients' needs but also optimize their plan spend."

About TPAC

TPAC Underwriters, Inc. is a Managing General Underwriting firm located in Minneapolis, Minnesota. In business since 1991, TPAC works to write profitable, creative business with our reinsurers in Traditional Medical Stop-Loss, Spaggregate, and HRA/HSA plans through Third-Party Administrators, fully-funded capitated drug card programs, Life and AD&D products. Visit www.tpac.com.

BERKLEY ACCIDENT AND HEALTH APPOINTS CLINT LIPTAC AS REGIONAL SALES MANAGER

Hamilton Square, NJ -- Berkley Accident and Health, a Berkley Company®, has appointed Clint Liptac as Regional Sales Manager for its EmCap® Group Captive division. In this role, Clint will be responsible for business development and existing relationships in Washington, Oregon, Idaho, Nevada, California, Arizona, and New Mexico.

"Clint has an established track record of opening up new markets and developing strong relationships. His multi-faceted experience in employee benefits will be a valuable asset to our clients," said Brad Nieland, President and CEO of Berkley Accident and Health. "I am very excited to have him as part of our team."

Clint comes to the Berkley Accident and Health team with over 25 years of sales experience on the TPA, brokerage, and carrier sides of insurance. Clint has held several account executive positions throughout the years that have allowed him to develop lasting relationships all over the western U.S.

Clint Liptac will be based in Bend, Oregon.

BERKLEY ACCIDENT AND HEALTH PROMOTES KEN KAPRELIAN TO NATIONAL DIRECTOR OF BUSINESS DEVELOPMENT FOR ITS STOP LOSS DIVISION

Hamilton Square, NJ – Berkley Accident and Health, a Berkley Company®, has promoted Kenneth Kaprelian to National Director of Business Development for its Stop Loss division. In his new role, Ken will collaborate with Berkley Accident and Health's traditional Stop Loss sales team to develop new broker partnerships and grow existing ones. He will also be responsible for overseeing various broker and client related initiatives.

"The National Director of Business Development is a critical role to support Berkley's rapidly growing Stop Loss business, and I'm thrilled to have Ken operating in this capacity," said Brad Nieland, President and CEO of Berkley Accident and Health. "Adding Ken as a key consultative resource for our brokers and clients strengthens our business and positions us well for continued growth."

Ken has nearly 30 years of employee benefits experience with the most recent 17 years concentrating in stop loss and self-funding. He brings a proven track record of strong communication and relational skill resulting in successful and sustainable long-term growth.

A graduate of the University of Delaware, Ken is based out of the Raleigh, NC area.

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 Captives, 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. Visit BerkleyAH.com and BenefitsCaptives.com.

ELAP SERVICES CO-FOUNDER AND CEO STEVE KELLY WINS 2019 EY ENTREPRENEUR OF THE YEAR AWARD

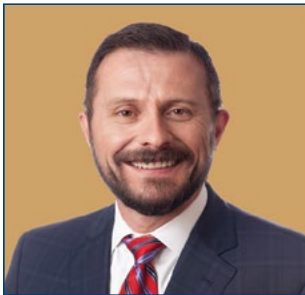
WAYNE, PA -- Steve Kelly, co-founder and CEO of ELAP Services, has been named a winner of the EY Entrepreneur Of The Year® 2019 Award in the Services category in Greater Philadelphia. The award recognizes entrepreneurs who excel in areas such as innovation, financial performance, and personal commitment to their businesses and communities, while also transforming our world. Kelly was selected by an independent panel of judges, and the award was presented at a special gala event at the Kimmel Center for the Performing Arts on June 19.

The award recognizes Kelly's leadership, both at ELAP Services and within the Philadelphia community, as well as the company's unwavering commitment to helping employers and their employees receive quality healthcare at a fair and reasonable price. Through partnerships with regional health systems, including Penn Medicine, ELAP Services offers employers a new kind of health plan that brings together world-class healthcare with a cost-containment solution.

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Trinidad Navarro, Insurance Commissioner

In his acceptance speech, Kelly thanked EY for the recognition as validation of the concept and mission of ELAP Services. According to Kelly, "We were not an overnight success; it took us 12 years to get here. There were a lot of sleepless nights, but it was all worthwhile. We want to take the momentum generated by this award to become a stronger, more positive corporate citizen of Philadelphia."

ELAP Services was founded to address the national issue of skyrocketing healthcare costs that overburden employers and their plan members, who lack representation in the ongoing healthcare debate. Since its founding in 2007, ELAP Services' reference-based pricing solutions have dramatically reduced healthcare costs for more than

450 self-funded employers with some 300,000 plan members nationwide. ELAP Services' 200 employees work with employers to custom design self-funded plans and serve as plan member advocates, reducing an employer's healthcare costs by as much as 30%.

Since 1986, EY has honored entrepreneurs whose ingenuity, spirit of innovation and discipline have driven their companies' success, transformed their industries and made a positive impact on their communities. Now in its 33rd year, the Entrepreneur Of The Year program has expanded worldwide to recognize business leaders in more than 145 cities in over 60 countries.

As a Greater Philadelphia award winner, Kelly is now eligible for consideration for the Entrepreneur Of The Year 2019 National Awards. Award winners in several national categories, as well as the Entrepreneur Of The Year National Overall Award winner, will be announced at the Entrepreneur Of The Year National Awards gala in Palm Springs, California, on November 16, 2019. The awards are the culminating event of the Strategic Growth Forum®, the nation's most prestigious gathering of high-growth, market-leading companies.



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About ELAP Services

ELAP Services specializes in healthcare solutions that reduce insurance costs for self-funded employers. The company offers a full-service program that ensures employers, their employees, and health systems receive a fair price for healthcare. From custom plan design to member advocacy, ELAP offers a portfolio of services that support clients with successfully navigating the changing healthcare climate and effectively managing their costs. Founded in 2007, ELAP has grown to serve more than 450 organizations, reducing their costs by as much as 30%. Headquartered in Wayne, Pa., ELAP is a company of the Water Street Healthcare Partners, a strategic investor focused exclusively on the healthcare industry. Visit www.elapservices.com.

About Entrepreneur Of The Year®

Entrepreneur Of The Year®, founded by EY, is the world's most prestigious business awards program for entrepreneurs. The program makes a difference through the way it encourages entrepreneurial activity among those with potential and recognizes the contribution of people who inspire others with their vision, leadership and achievement. As the first and only truly global awards program of its kind, Entrepreneur Of The Year celebrates those who are building and leading successful, growing and dynamic businesses, recognizing them through regional, national and global awards programs in more than 145 cities in over 60 countries. Visit www.ey.com/en_us/entrepreneur-of-the-year.



THE PHIA GROUP ANNOUNCES PACE CERTIFICATION

The Phia Group proud to announce their Plan Appointed Claim Evaluator (PACE) Certification program will be launching on August 1, 2019.

Details: The PACE Certification program will educate you using 3 distinct chapters of information:

- Chapter One - Explore the ins and outs of self-funding while learning about its risks and rewards. This chapter will transform any individual into a self-funding pro.
- Chapter Two - Take a deeper dive into the laws that apply to self-funded plans. We cover it all, from federal preemption to adverse benefit determinations and appeals.
- Chapter Three - Explain what PACE is, what PACE does, and how it's obtained, implemented, and utilized.

The PACE Certification program is free of charge and will create immense value for your organization. By going through the Certification program, you, or a select person, or team, within your organization, can become PACE Certified. Once PACE Certified, the Program participant(s) will become highly educated PACE business owners and will serve to assist your organization in growing your PACE business, enhancing your PACE revenue, and assuring your appeals processes are the most compliant and best in the industry. Those who complete the Certification will also receive a PACE

Certification Fact Sheet, providing an easy to understand summary of the content and best practices covered, which will allow you to maximize the lessons learned within your business.

Additionally, the PACE Certification program will provide education on self-funding in general, claims and appeals regulatory education, and overall best practices surrounding fiduciary duties, claims, and appeals.

The PACE Certification program will be released to all those interested starting August 1, 2019. Please see the PACE Certification flyer for more information.

Please contact Tim Callender (tcallender@phiagroup.com) or Garrick Hunt (ghunt@phiagroup.com) for more information.

About The Phia Group

The Phia Group, LLC is an experienced provider of health care cost containment techniques offering comprehensive consulting services, legal expertise, plan document drafting, subrogation and overpayment recovery, claim negotiation, and plan defense designed to control costs and protect plan assets. Visit www.PhiaGroup.com.

SUN LIFE U.S. APPOINTS JENNIFER COLLIER TO LEAD STOP-LOSS & HEALTH BUSINESS

WELLESLEY, Mass. -- Sun Life U.S. has named Jennifer Collier senior vice president of Stop-Loss & Health, the largest independent stop-loss insurance provider in the country, with 2,300 employer clients covering more than 4.7 million people, and \$1.7 billion in premium.

Collier joins Sun Life from Cigna where most recently she was chief operating officer of its middle market operations. As a registered nurse and MBA, Collier brings both clinical and business management expertise to risk and cost management strategies for Sun Life's self-funded employer clients. Many employers self-fund their health plans, which can leave them vulnerable to high-cost claims. Stop-loss coverage



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Mary Ann Carlisle, CEO
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Dan Bolgar, CEO
dbolgar@sequoiaris.com
952.221.7770



ELMC Risk Solutions has assembled some of the most innovative minds in stop-loss reinsurance and prescription drug consulting businesses.

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protects self-funded employers from these claims, which impact 85% of self-funded employers in any given policy year.

"Jen's experience brings a unique perspective in leading our stop-loss business and continuing to develop expanded solutions for our self-funded clients," said Dan Fishbein, M.D., president of Sun Life U.S. "Our Stop-Loss & Health business is focused on recognizing trends that can help self-funded employers reduce and manage costs while improving medical care for members. Jen's background is an ideal fit for Sun Life's approach to guiding clients through complex, high-cost claims, and I look forward to bringing her expertise to our dedicated clinical and claims teams."

Collier spent 17 years at Cigna, where she held senior leadership roles in U.S. commercial business, spanning national accounts to small business lines, including clinical operations, strategic implementation, underwriting, and stop-loss.

"I am thrilled to be working with the Stop-Loss & Health team at Sun Life, and seeing first hand all of the innovative approaches they have fostered in managing high-dollar claims," said Collier. "The right balance of clinical and cost management is how we achieve better outcomes for patients while providing effective solutions for our clients."

Sun Life has been in the stop-loss business for over 35 years and offers extensive risk management expertise and tools that help self-funded employers effectively manage the cost of their employee medical benefits. As head of Stop-Loss & Health, Collier will oversee all aspects of the Stop-Loss

business, including the development of new health initiatives and solutions, such as the Clinical 360 program which combines data analytics and clinical expertise to identify cost containment and improved treatment options for self-funded employers and their employees. In 2018 Sun Life's Clinical 360 program achieved over \$6.2 million in savings for employers.

Before joining Cigna Collier was a cardiac nurse at a Connecticut hospital, and earlier in her career she focused on increasing states' capacities to serve children with disabilities through grants from the U.S. Department of Health and Human Services. She received her Bachelor of Science in nursing from Saint Joseph College, and her MBA in finance and marketing from the University of Connecticut School of Business.



About Sun Life

Sun Life is a leading international financial services organization providing insurance, wealth and asset management solutions to individual and corporate Clients. Sun Life has operations in a number of markets worldwide, including Canada, the United States, the United Kingdom, Ireland, Hong Kong, the Philippines, Japan, Indonesia, India, China, Australia, Singapore, Vietnam, Malaysia and Bermuda. As of March 31, 2019, Sun Life had total assets under management of C\$1,011 billion. Visit www.sunlife.com.

In the United States, Sun Life is one of the largest group benefits providers, serving more than 60,000

employers in small, medium and large workplaces across the country. Sun Life's broad portfolio of insurance products and services in the U.S. includes disability, absence management, life, dental, vision, voluntary and medical stop-loss. Sun Life employs approximately 6,000 people in its U.S. insurance and asset management businesses. Group insurance policies are issued by Sun Life Assurance Company of Canada (Wellesley Hills, Mass.), except in New York, where policies are issued by Sun Life and Health Insurance Company (U.S.) (Lansing, Mich.). Visit www.sunlife.com/us.

GOLD MEMBERS

PARTNERRE HEALTH ADDS NEW TEAM MEMBERS: TRAVIS BRENDEN, TRACY HASTINGS, DUANE PFAFF, TERRI BROBERG, STEVE BENNETT, AND LUCY ALLEN

We are pleased to announce several new additions to PartnerRe Health. Joining us primarily in our Minnesota office are Travis Brenden, Chief Underwriting Officer, Tracy Hastings, Chief Finance and Operations Officer, Duane Pfaff, Head of Finance, Terri Broberg, Senior Underwriter, Managed Care, Steve Bennett, Senior Underwriter, Managed Care and Lucy Allen, Client Partner, Managed Care.

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Kelly Munger, Head of Health, commented "Please join me in welcoming the newest members of our team to PartnerRe. Many of you are familiar with one or all of them and know the deep technical and commercial skills that they bring to us. They also share a commitment to PartnerRe's innovative and client centric approach and will aid in the continued growth and development of our US Health business."

They will be reaching out to our producers over the coming weeks and I am confident that, together we will continue to provide the service and expertise that our clients have come to rely upon."

About PartnerRe Ltd.

PartnerRe Ltd. is a leading global reinsurer that helps insurance companies reduce their earnings volatility, strengthen their capital and grow their businesses through reinsurance solutions. Risks are underwritten on a worldwide basis through the Company's three segments: P&C, Specialty, and Life and Health. For the year ended December 31, 2018, total revenues were \$5.6 billion. At March 31, 2019, total assets were \$24.0 billion, total capital was \$8.4 billion and total shareholders' equity was \$7.0 billion. PartnerRe enjoys strong financial strength ratings as follows: A.M. Best A / Moody's A1 / Standard & Poor's A+. Contact Ali Duerr, AVP, Marketing & Communications, at ali.duerr@partnerre.com and visit www.partnerre.com/health.

COLLECTIVE HEALTH RAISES \$205M SERIES E LED BY SOFTBANK

Employee health benefits platform company Collective Health has raked in a massive \$205M Series E funding round led by mega-investor Softbank as it looks to boost its nationwide growth and build on momentum with its employer customers.

The San Francisco-based company serves around 200,000 members across more than 45 self-funded employer clients with care navigation tools and healthcare resources that make benefits easier to access and understand, stripping away administrative burden and lowering healthcare spending in the process.

A large part of the company's value proposition is in updating and unifying the range of technology systems into one streamlined platform. The company largely functions as a third-party administrator for self-funded employers and works to effectively administer benefits and negotiate provider networks.

Collective Health was founded in 2013 and has raised a total of \$435 million. Over the past year the company said it seen 85 percent membership growth.

On the employer side, Collective Health's platform gives companies visibility into their total range of healthcare costs, which can be used to inform more efficient resource allocation and benefit offerings.

"There's no question about the scale of the problem, we spend \$1.2 trillion on healthcare and the industry still operates in the fax era of technology," said Collective

Health co-founder Rajaie Batniji.

The capital injection will help the company expand its range of enterprise customers, as well as bring new healthcare partners onto its platform including new local and national medical networks and integrated digital health products.

Collective's customer base – which includes clients like Zendesk, Pinterest and Activision Blizzard – has been largely limited to technology companies.

"One of the biggest changes we've been focused on is moving firmly out of the early adopter phase and into mainstream with clients in nursing, retail and CPG," Batniji said.

"We're really moving into a diversity of sectors because if we're going to transform healthcare we have to prove that this is a solution that works for everybody.

Investment dollars will also go toward continuing development of the company's tech stack with faster payment systems, faster fraud detection and machine learning-based technology that can better personalize and guide member health recommendations.

Additionally, the company is focused on growing its 500-person headcount across its San Francisco headquarters and its satellite offices in Chicago and Lehi, Utah.

"The complexity around healthcare coverage is making us sick and we see the opportunity here to make the member experience better and fundamentally improve the healthcare system. We firmly believe that this will

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lead to improved health outcomes and people being healthier," Batniji said.

The investment into Collective Health represents a major healthcare bet from Softbank's Vision Fund, which has backed companies like Slack, Uber and Nvidia.

In healthcare, Softbank has invested in a number of mainly biotech-focused companies including Relay Therapeutics, Roivant Sciences and Zymergen. Also participating in the funding round were investors including DFJ Growth, PSP Investments, Founders Fund and NEA. Softbank will be receiving a board seat as part of the deal.

"With US healthcare costs at \$3.65 trillion in 2018, Collective Health is reinventing the healthcare experience for companies and their employees," SoftBank Investment Advisers Senior Managing Partner Deep Nishar said in a statement.

"Their innovative business model and technology platform are not only helping employers understand and optimize their healthcare spend, they are also providing employees with a better healthcare experience."

About Collective Health

While medical technology continues to take giant steps forward, somehow the systems driving health coverage are still stuck in the past. The experience we have today is confusing. It's painful. And we all deserve better. Collective Health was founded on the belief that better is possible. Driven by our mission to make understanding, navigating, and paying for care effortless, we've evolved the way health benefits work.

More than 151 million Americans count on an employer for coverage. That's why, with the technology to create a more intelligent solution and the compassion to know that every person matters, we deliver a connected healthcare experience for companies across the nation who want the best for their employees. Contact National Leader of Direct Provider Solutions, Eric Parmenter CLU, ChFC, RHU, REBC, CEBS, SPHR, MBA at eric.parmenter@collectivehealth.com and visit collectivehealth.com.

PARTNERS MANAGING GENERAL UNDERWRITERS WELCOMES CAROLINE GRAHAM SEID

Phoenix, AZ -- Partners is excited to announce that Caroline Graham Seid has joined our team as an Executive Underwriter.

Carol brings more than 35 years of experience in the insurance industry to Partners. Prior to joining Partners, Carol spent 22 years with Symetra (and its predecessors) selling and underwriting stop loss. Previously she held account management and consulting positions with Independence Blue Cross, Coopers & Lybrand and Johnson & Higgins. Carol and her husband Jay have five children (ranging in ages from 24-29). In her spare time Carol reads, gardens, collects art and travels. Carol is an avid sports fan but follows football and ice hockey passionately.

Commenting on her new role, Carol said, "It is an incredible opportunity to be a part of the dynamic team at Partners."

Please feel free to contact Carol with questions about her new role, or about becoming a Producer-Partner: caroline.seid@partnersmgu.com, 480.565.8952.

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About Partners

Partners Managing General Underwriters is an entrepreneurial organization underwriting medical Stop Loss for the self-insured marketplace. Licensed in all 50 states, our team is comprised of seasoned professionals with a long history in employee benefits. We offer a unique opportunity unlike anything in the marketplace and it's available only to our Producer-Partners. Visit www.partnersmgu.com.

SILVER MEMBERS

H.H.C. GROUP CELEBRATES START OF ITS 25TH YEAR OF SAVINGS, SOLUTIONS AND SERVICE

H.H.C. Group announced it is starting its 25th year as a national healthcare insurance consulting company. H.H.C. Group provides cost-containment services to ERISA plans, TPAs, self-insured and government entities. Founded in 1995 by Bruce Roffe', its president and CEO, the company's mission from day one has been to assist payors in minimizing their liability for the medical services provided to their enrollees/members.

H.H.C. Group offers an ever-growing suite of targeted solutions to meet payers evolving needs. It utilizes a combination of industry expertise, technical innovation, highly-trained staff, and dedication to superior customer service to meet its clients' needs and exceed their expectations. Importantly, it continues to add services to meet emerging marketplace challenges.

"From day one we have worked to help our clients achieve their cost-containment goals. We're dedicated to meeting their existing and future needs in the ever-changing healthcare insurance environment," said Dr. Roffe'. "We started by just negotiating claims. Over the years, we have added, and continue to add, more services to meet emerging marketplace needs. Our clients come for the savings and stay because we deliver on our promises, offer sound advice and provide exceptional, personalized customer service."

H.H.C. GROUP WELCOMES ADA PETTIES AS A REGIONAL VICE PRESIDENT OF SALES

H.H.C. Group is proud to announce the addition of Ada Petties as a Regional Vice President of Sales with responsibility for the Midwestern United States. Ada brings experience in the health care field, sales client service.

Immediately prior to joining H.H.C. Group Ada served as a Utilization Review Coordinator at Holy Cross Hospital in Silver Spring, MD. There she gained an in-depth understanding of the provider, payer and patient components of the healthcare system. Ada also brings extensive sales and client service experience, gained in her 10 years as a Home Mortgage Consultant at Well Fargo Bank. A Maryland native, she has a Bachelor of Science Degree in Business Administration.

About H.H.C. Group Services

H.H.C. Group's services include Claim Negotiation, Claim Repricing, Reference Based Pricing, DRG Validation, Medical Bill Review (Audit), Claims Editing, Medical Peer Reviews/Independent Reviews, Utilization Reviews, Data Mining, Disease Management Independent Medical Examinations (IME), DRG Validation, and Pharmacy Consulting.

For additional information about H.H.C. Group and our services, visit www.HHCgroup.com and contact Bob Serber at rserber@HHCgroup.com or 301-963-0762 ext. 163. ■

SIIA 2019

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IIA NEW MEMBERS

AUGUST 2019

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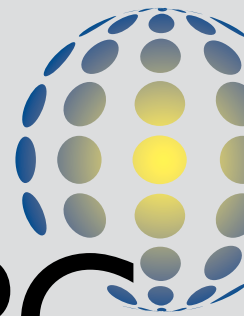
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