



NEWS FROM SIIA MEMBERS

2020 JANUARY MEMBER NEWS

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

DIAMOND MEMBERS

MATT TAYLOR JOINS DALLAS SALES TEAM AT HM INSURANCE GROUP

PITTSBURGH -- Matt Taylor has joined HM Insurance Group (HM) in the role of sales consultant, Dallas Regional Sales. In this position, he is responsible for working with brokers in Arkansas, Oklahoma and Dallas (including West Texas) to support the growth of HM's business in those markets.

Most recently, Taylor was a senior sales representative at Voya where he sold stop loss, life, disability and voluntary benefits. Prior to that, he gained sales experience at Arthur J. Gallagher. Taylor has a bachelor's degree from the University of Houston where he played Division 1 baseball.

About HM Insurance Group

HM Insurance Group (HM) works to protect businesses from the potential financial risk associated with catastrophic health care costs. The company provides reinsurance solutions that address risk situations confronting employers, providers and payers. A recognized leader in employer stop loss, HM also offers managed care reinsurance nationally. Through its insurance companies, HM Insurance Group holds insurance licenses in 50 states and the District of Columbia and maintains sales offices across the country. Contact Jennifer Sheposh Mahan, Marketing & Communications Consultant, at jennifer.mahan@hminsurancegroup.com and visit hmig.com.

SUN LIFE U.S. NAMES PAULA BARTGIS AS CIO

WELLESLEY, Mass., -- Sun Life U.S. announced that it has named Paula Bartgis as senior vice president and chief information officer (CIO). Bartgis will have responsibility for the company's Information Technology operations, focused on delivering outstanding client experiences through innovative digital, data and analytic tools and practices.

Bartgis joins Sun Life from Voya Financial where she most recently served as senior vice president of its Enterprise Project Management Office.

"Paula is an accomplished technology transformation leader known for creating high-performing teams and producing successful outcomes for clients," said Dan Fishbein, M.D., president of Sun Life U.S.

"Our clients expect simplified interactions and continually advancing capabilities. Paula's deep tech experience and proven track record of orchestrating complex, large-scale initiatives make her ideally suited to lead our next-generation solutions to deliver on our client commitments while fueling business growth."

Bartgis has held a number of leadership roles during her 30-year career in technology and engineering, financial and operational planning, organizational design, and project and portfolio management.

At Voya, she also served as the head of Enterprise Transformation, Technology and Project Management Office, and led teams at Massachusetts Mutual Life Insurance



Company (MassMutual) overseeing acquisition integration and business transformation.

Earlier, she served as vice president of engineering and information systems at The Travelers Companies.

"I'm excited to join Sun Life, which is a forward-thinking organization invested in the client experience," said Bartgis. "Technology is an area of constant change at the heart of an enterprise, connecting internal and external stakeholders and driving progress. I look forward to harnessing the creative mindset at Sun Life to help shape the future of the digital insurtech enterprise."

Bartgis invented an assessment framework to measure project delivery effectiveness, which was patented for MassMutual. She holds a bachelor's degree in computer science from the Florida Institute of Technology.

About Sun Life U.S.

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 and its affiliates in asset management businesses in the U.S. employ approximately 5,500 people. 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.

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ELMC RISK SOLUTIONS ACQUIRES LEADING DIGITAL HEALTH PLATFORM TESSER HEALTH, INC., EXPANDING CAPABILITIES IN RX MANAGEMENT

New York, NY – ELMC Risk Solutions, LLC, (“ELMC”) is pleased to announce that it has acquired the assets of Tesser Health Inc. (“Tesser Health”), of Miami, Florida, and has established the Tesser Health division of ELMCRx Solutions, LLC.

Tesser Health is a technology driven, digital health company focused on managing prescription drug costs. This acquisition furthers ELMC's strategic expansion through thoughtful acquisitions in the Pharmaceutical Benefit Management, Rx management, and analytics space.

The Tesser Health division will join ELMCRx Solutions in delivering state of the art outcomes by leveraging a broad range of cost containment, analytics, and consulting services. Tesser Health joins ELMC's portfolio companies including AST Risk, ELMCRx Solutions, IOA Re, Rockport Benefits, RxReins, and Sequoia Reinsurance.

Tesser Health is led by CEO Riyaad Seecharan, CMO Ali Khoshnevis and CTO Humberto Lee, experienced digital health professionals and successful entrepreneurs. All three contributed to the growth of other innovative prescription drug companies before focusing their attention on building the Tesser Health platform. The Tesser Health management team will report to Mary Ann Carlisle, CEO of ELMCRx Solutions.



“The acquisition of Tesser Health will allow ELMC to further expand its cost containment and management offerings, with enhanced specialty and non-specialty solutions provided under our rebranded Tesser suite,” said Richard Fleder, CEO of ELMC. “These products combined with Tesser Health's sophisticated analytics capabilities will allow us to deliver an innovative platform of smart, straightforward solutions to plan sponsors, carriers, TPAs, brokers and consultants.”

Mary Ann Carlisle, CEO of ELMCRx Solutions noted, “We are excited to leverage the Tesser Health team and the digital health platform to further develop the ELMCRx Solutions Clinical Prior Authorization service offering.

Seecharan, Khoshnevis and Lee agree, “We are pleased to combine our strengths with ELMCRx Solutions to meet the demands of the rapidly-changing pharmaceutical marketplace. The ELMCRx Solutions platform enables us to reach a larger audience as well as round out our service offering.”

Tesser Health started its pharmaceutical cost containment business for self-funded employer health plans in 2016 with the launch of its highly regarded digital health platform.

Tesser Health will maintain its focus on prescription drug cost containment and optimization for employer plans, as well as developing new products designed to manage and optimize specialty drugs. The company will maintain their offices in Miami, Florida.

About ELMC

ELMC owns, manages and seeks to acquire premier Managing General Underwriters and Pharmaceutical Benefit Management service companies across the nation that specialize in delivering services for self-funded health plans, health care coalitions, labor and union groups, as well as reinsurance for providers and managed care companies. ELMC provides a best-in-class platform for delivering solutions to brokers, carriers and clients. For more information, visit www.elmcgroup.com.

About Tesser Health

Tesser Health is a digital health platform focused on delivering cost containment solutions for self-funded employer health plans. The company's proprietary digital health platform analyzes claims data to determine member adherence, polypharmacy, and cost savings opportunities. Using a unique combination of analytics and engagement tools, the Tesser Health platform lowers prescription drug spend for plan sponsors. For more information, visit www.tesserhealth.com.

ELAP SERVICES' STEVE KELLY NAMED ENTREPRENEUR OF THE YEAR® 2019 FINANCIAL SERVICES AWARD FINALIST

WAYNE, Pa. & PALM SPRINGS, CA -- EY announced that Steve Kelly, Co-founder and CEO of ELAP Services, a provider of healthcare solutions that reduce costs for self-funded employers, was named a national finalist for the Entrepreneur Of The Year® 2019 Award in the Financial Services category.

Now in its 33rd year, this prestigious award recognizes and celebrates unstoppable entrepreneurs who redefine the way we live, work and play. Kelly was named a finalist by an independent panel of judges, and the recognition was announced at the Strategic Growth Forum® in Palm Springs on November 16.



Mind over risk.

That's how we properly assess risk – enabling our clients to focus on their businesses. We provide innovative stop loss solutions to protect self-funded employers from potentially catastrophic losses. We offer flexible captive solutions to help control the severity risk of your self-insured program. We have developed medical stop loss solutions specifically dedicated to meeting the unique needs of Taft-Hartley union plans. Our Organ & Tissue Transplant policy is a fully-insured option to protect your self-funded plan from losses due to transplant exposures. Our clients have been benefiting from our expertise for over 40 years. To be prepared for what tomorrow brings, contact us for all your medical stop loss and organ transplant insurance needs.



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“Each year, I’m amazed by the contributions and successes of the Entrepreneur of the Year Award nominees and finalists. The competition is stiff, and I’m honored to be selected from such a distinguished field as a national finalist,” said Kelly.

“This award validates that our approach to reducing healthcare costs is redefining the way both businesses and providers approach healthcare, and it’s changing the system for the better. I’m thrilled to bring this recognition home to our company and to Philadelphia, and I’m eager to continue our work in creating more affordable healthcare solutions for the people of this country.”

ELAP Services was founded to address the national issue of employers and their plan members overburdened by skyrocketing healthcare costs and lack of representation in the ongoing healthcare debate.

Today, the company provides reference-based pricing solutions that dramatically reduce healthcare costs for more than 450 self-funded employers with some 300,000 plan members nationwide.



ELAP’s 175+ employees work with employers to custom design self-funded plans and serve as plan member advocates in ways that reduce an employer’s healthcare costs by as much as 30%.

EY has celebrated entrepreneurial excellence by honoring those innovators and prominent leaders who have contributed and inspired others with their vision, leadership and achievement since 1986.

These leaders are driven by their desire to better the world around them and stop at nothing to achieve their greatest ambitions. In 2019, the 233 award winners represented 191 entrepreneurial companies, employing more than 146,000 people with a job growth of 28 percent. They generated revenue of more than 42 billion, with revenue growth increasing more than 46 percent.

The program has continually recognized high-caliber business leaders, including Brad Keywell of Uptake Technologies in 2018. Past US winners have included Lonnie Moulder and Mary Lynne Hedley, TESARO, Inc, Howard Schultz of Starbucks Coffee Company, Robert Unanue of Goya Foods, Hamdi Ulukaya of Chobani, and Jayshree Ullal and Andy Bechtolsheim of Arista Networks.

The Entrepreneur Of The Year Award program has proven its ability to pick out particular traits within a company that will then catapult it to join the ranks of some of the world’s most successful and thriving businesses. These winners have shown what it takes to build and, more importantly, sustain a thriving enterprise.

Kelly was originally selected as a regional Entrepreneur Of The Year winner in the Services category from the Philadelphia region. He was selected as one of 44 national finalists from over 1,300 applicants nationwide.

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 health care climate and effectively managing their costs. Founded in 2003, ELAP has grown to serve more than 400 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 is the world's most prestigious business award for entrepreneurs. The unique award 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 award 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 more than 60 countries.

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GOLD MEMBERS

ECHO MAKES INC. 5000 LIST FOR SEVENTH TIME

Westlake, OH -- ECHO Health Inc. has once again been named one of the fastest-growing private companies in the nation by Inc. Magazine, earning the position of #2970 on the 2019 Inc. 5000 list. All honoree companies are individually profiled on Inc.com and receive the unique opportunity to gain national recognition.

Companies are ranked according to the percentage growth of their annual revenue over a three-year period, meaning that ECHO has been growing long before their first appearance on the list in 2012. ECHO's continued success has resulted in a 3-year growth rate of 126%.

This prestigious list has become the hallmark of entrepreneurial success and the place where future household names first make their mark. Pandora, 7 Eleven, Toys 'R' Us, Zipcar, Zappos.com and numerous other well-known brands have been honored by the Inc. 5000. In 2007, the Inc. 500 list expanded to the Inc. 5000, giving readers a deeper, richer understanding of the entrepreneurial landscape and capturing a broader spectrum of success.

"It has been another successful period of growth at ECHO and we are thrilled to be featured on this prestigious list once again," says William Davis, Chairman and CEO of ECHO Health, Inc.

"ECHO continues to surpass all expectations and not only grow, but flourish as an industry innovator within a highly competitive and complex segment of business. We are truly grateful for this honor and are determined to continue to appear on the Inc. lists for years to come."

About ECHO Health, Inc.

ECHO Health, Inc. is the leading provider of electronic healthcare payment solutions. ECHO processes over 120 million claims and pays more than \$28 billion annually to providers and members through industry-leading payers. Founded in 1997, ECHO is a privately held company located in Westlake, Ohio. Visit www.echohealthinc.com and call 440.835.3511, ext. 118.

SILVER MEMBERS

LIZA PASTORE JOINS H.H.C. GROUP AS BUSINESS OFFICE MANAGER

H.H.C. Group announced the addition of Liza Pastore as Business Office Manager. Her responsibilities will include management of the accounting, payroll, and benefits coordination functions.

Prior to joining H.H.C. Group, Liza served as Business Manager at an architectural

firm. She also helped launch a boutique real estate firm based out of Bethesda, serving as both Sales Transactions Coordinator and Office Manager.

Liza graduated from Marymount Manhattan College in New York City in 2005 with a degree in Communication Arts and Business Management and spent the first 12 years of her career in real estate sales.

"I am honored to become a part of HHC Group's ongoing success. The staff has given me a warm welcome. Jeanne Hurley, Supervisor of Business Services, is a wealth of knowledge with excellent client relations that she is passing along to me through intensive training. I feel valued as a new addition to the Group."

"We are pleased to welcome Liza aboard" said Dr. Bruce Roffé, H.H.C. Group's President and CEO "Her knowledge and experience will enable her to quickly become an important member of the H.H.C. Group Team."

About H.H.C. Group

H.H.C. Group provides containment solutions for Insurers, Third Party Administrators, Self-Insured Employee Health Plans, Health Maintenance Organizations (HMOs), ERISA and Government Health Plans. H.H.C. Group utilizes a combination of highly skilled professionals and advanced information technology tools to consistently deliver targeted solutions, significant savings and exceptional client service.

H.H.C. Group's services include Claim Negotiation, Claim Repricing, Medicare Based Pricing, DRG Validation, Medical Bill Review (Audit), Claims Editing, Medical Peer Reviews/Independent

Reviews, Independent Medical Examinations (IME), and Pharmacy Consulting. H.H.C. Group is an URAC accredited Independent Review Organization for Internal and External Reviews.

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

INDUSTRY LEADER LAURIE HOAG-WINKLER RETURNS TO IMA FINANCIAL GROUP WITH FOCUS ON EMPLOYEE BENEFITS

Denver, CO -- After six years away, Laurie Hoag-Winkler is returning to IMA Financial Group as executive vice president and national practice leader for IMA, Inc's employee benefits practice. Hoag-Winkler will partner with Executive Vice President and National Client Experience Leader Kristi Gjellum, who has been with IMA for more than 15 years.

"With more than 50 years of experience between them, we are thrilled to have this power team focused on the client and employee experience," says IMA President Bob Reiter. "Together, they bring deep industry knowledge, strategic expertise, and an unmatched enthusiasm to their practice. Just as importantly, they will serve as role models, as IMA is committed to gender diversity, including in leadership positions. It's an exciting time at IMA."

Hoag-Winkler and Gjellum say they plan to build on IMA's service formula to listen to their clients, build a strategy that meets their clients where they are, execute, and measure results. That means financial return, employee satisfaction, and an overall successful experience for IMA clients.

"I can't wait to hit the ground running with Kristi (Gjellum) and the team," says Hoag-Winkler. "Working together, we can deliver innovative, effective services and products

that are also unique and engaging. We want our clients to succeed and have fun while they are doing it. Here at IMA, we practice what we preach, which is one of the reasons I am returning. IMA understands its success is built on a strong workplace culture of respect, collaboration, inclusivity, and, yes, fun!"

Previously, Laurie was senior vice president and director at Lockton Companies and has held leadership positions at USI Colorado, previously Van Gilder Insurance Corp. She is a member of the Work Options for Women Board and a former member of St. Jude Children's Research Hospital Advisory Board.

About IMA Financial Group, Inc.

The IMA Financial Group, Inc., is a diversified financial services company focused on protecting the assets of its varied client base through insurance and wealth management solutions. Because IMA is 100-percent employee owned, the company's more than 700 associates in Colorado, Kansas, Michigan, and Texas are empowered to provide customized solutions for their clients' unique needs. Visit imacorp.com. ■



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SIIA NEW MEMBERS

JANUARY 2020

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Mark Hufham
Director of Marketing
Benefits Science Technologies
The Woodlands, TX

SILVER CORPORATE MEMBER

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