

## Foundation Plays Key Role in Supporting the Self-Insurance Industry

Originally established as 501(c)(3) organization affiliated with the Self-Insurance Institute of America, Inc. (SIIA), SIEF has had a vital role in supporting the self-insurance and alternative risk transfer industry for more than 20 years. The foundation's mission is to raise the awareness and understanding of self-insurance among the business community, policy-makers, consumers, the media and other interested parties, and has been modernized in way to provide more direct value to those currently involved in the industry.

The foundation is governed by a board of directors comprised of well-known industry leaders including:

Nigel Wallbank  
Chairman

Heidi Leenay  
President

Freda Bacon  
Director

Les Boughner  
Director

Alex Giordano  
Director



SIEF has participated in many endeavors to further their mission over the years including

- sponsoring essay contests and internship programs geared for college students pursuing degrees in insurance and/or risk management
- producing and maintaining a website that serves as an online hub for objective information about self-insurance
- sponsoring the participation of high profile, professional and government speakers to participate at SIIA conferences
- underwriting an annual survey report of the stop-loss marketplace
- and producing high quality publications that provide reference information about self-insured group health plans, group self-insured workers' compensation programs and captive insurance companies.

SIEF has also coordinated multiple educational sessions on Capitol Hill, which have been designed to help congressional staff members understand the basics about self-insurance and captive insurance.

The foundation's financial support comes entirely from voluntary contributions and from participation in various fundraising events, including raffles with a variety of prizes and the always popular golf tournaments held in conjunction with SIIA events. All contributions to SIEF are tax deductible, so by financial supporting the foundation you can also reduce your company's tax liability -- a true win-win situation.

SIEF will be hosting one of their golf tournaments in conjunction with SIIA's 37<sup>th</sup> Annual National Conference & Expo, on October 8, 2017 at the Wildfire Golf Club at the JW Marriott Desert Ridge Resort & Spa in Phoenix, Arizona.

The golf tournament is open to all conference registrants, and promise to be an excellent opportunity to network with executive-level industry colleagues and peers. The tournament will be a scramble format and you can either sign up as an individual or reserve a foursome.

Registration & Breakfast 7:00 am – 8:00 am

Shot-Gun Start 8:00 am

Tournament Play 8:00 am – 12:00 pm



\$450 per person

\$1800 per foursome

Includes: Green Fees for 18 Holes, Golf Cart, Continental Breakfast, Beverages, Post-Tournament Lunch and Various Prizes. All skill levels are welcome!

Don't miss this exclusive opportunity to better your handicap, refine your putting skills and support the foundation dedicated to ensuring the development of tomorrow's leaders in the self-insurance/captive insurance industry. This is also a great event to promote your company's corporate brand through a variety of sponsorship opportunities. For sponsorship information, contact Shane Byars at 800/851-7789, or via e-mail at [sbyars@siaa.org](mailto:sbyars@siaa.org).

For more information SIEF or to contribute, please visit [www.siefonline.org](http://www.siefonline.org).



**SIPPC**  
Self-Insurers' Publishing Corp.

## Do you aspire to be a published author?

Do you have any stories or opinions on the self-insurance and alternative risk transfer industry that you would like to share with your peers?

We would like to invite you to share your insight and submit an article to *The Self-Insurer!* SIIA's official magazine is distributed in a digital and print format to reach over 10,000 readers around the world. *The Self-Insurer* has been delivering information to the self-insurance/alternative risk transfer community since 1984 to self-funded employers, TPAs, MGUs, reinsurers, stop-loss carriers, PBMs and other service providers.

Articles or guideline inquiries can be submitted to Editor Gretchen Grote at [ggrote@sipconline.net](mailto:ggrote@sipconline.net)

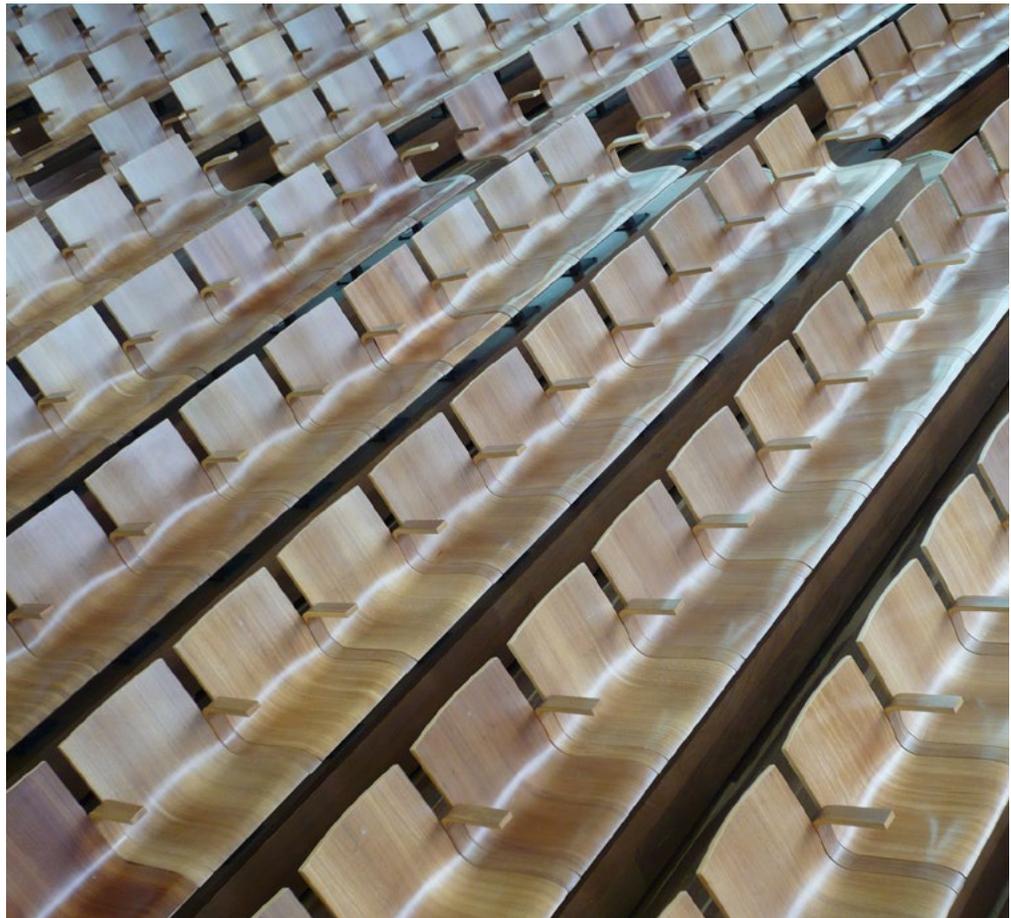
*The Self-Insurer* also has advertising opportunities available. Please contact Shane Byars at [sbyars@sipconline.net](mailto:sbyars@sipconline.net) for advertising information.

# NEWS from SIIA Members

## 2017 JULY 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 Wrenne Bartlett at [wbartlett@siaa.org](mailto:wbartlett@siaa.org). All submissions are subject to editing for brevity. Information about upgraded memberships can be accessed online at [www.siaa.org](http://www.siaa.org). For immediate assistance, please contact Jennifer Ivy at [jivy@siaa.org](mailto:jivy@siaa.org). If you would like to learn more about the benefits of SIIA's premium memberships, please contact Jennifer Ivy and [jivy@siaa.org](mailto:jivy@siaa.org).*



### **Diamond Members**

#### **Berkley Accident and Health Hosts its Largest Captive Symposium to Date**

Berkley Accident and Health, a Berkley Company, welcomed more than 200 attendees and guests to the 2017 Berkley Captive Symposium. The three-day meeting is a signature event for Berkley Accident and Health. It brings together a unique mix of captive members, brokers, TPAs, and risk management experts for a powerful time of education, collaboration, and networking.

Held April 23-26 in Grand Cayman, the Symposium is a dynamic time to share ideas and talk specifics about health risk management strategies and execution. The event featured:

- Educational sessions on tactics to manage first-dollar and catastrophic claims, including: specialty Rx, telehealth, obesity management, COBRA enrollments, and reference based pricing
- Mike Ferguson, President and CEO of the Self-Insurance Institute of America (SIIA), who shared insights into the current political and regulatory landscape
- Adam Russo, CEO of The Phia Group, who discussed cost-containment techniques for plan documents

- Annual business meetings for several Berkley programs, focusing on: financial results, new member-driven initiatives, and collaborative risk management strategies
- Orientation for new captive members and case studies, as well as networking opportunities for attendees to connect with each other in relaxed settings

The 7th annual Berkley Captive Symposium was the largest and most successful meeting to date. "It was a great opportunity to learn more about what others are doing to control medical and Rx costs," stated one attendee. In the follow-up survey, 100% of respondents stated they were "very likely to recommend the Symposium to a colleague or friend."

The Berkley Captive Symposium is an invitation-only event for captive members and distribution partners of Berkley Accident and Health. To learn about next year's event, please contact one of Berkley Accident and Health's captive business development leaders about attending next year: Find your local EmCap expert.

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<p><b>PLAN DOCUMENTS PERFECTED</b> Phia Document Management - <i>PDM</i></p>		<p><b>LEGAL EXPERTISE SECURED</b> Independent Consultation &amp; Evaluation - <i>ICE</i></p>

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The Phia Group, LLC | 163 Bay State Drive, Braintree, MA 02184 | Phone: 781-535-5600 | [www.phiagroup.com](http://www.phiagroup.com)

## 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 Captive, 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. Contact Jim Hoitt, Sr. Vice President - Captive Division JHoitt@BerkleyAH.com and visit [www.BerkleyAH.com](http://www.BerkleyAH.com) and [www.benefitscaptives.com](http://www.benefitscaptives.com).

## HM Insurance Group Announces Tom Doran as New President & COO

Tom Doran has been named president & COO of HM Insurance Group (HM), replacing Matt Rhenish, who accepted a new role at Highmark Inc., HM's parent company, as president of national and specialty businesses.

As president of HM, Doran will be responsible for the strategy, operational management and executive leadership of the company. He brings more than 20 years of expertise in reinsurance, pricing, reserving, underwriting, actuarial services and network contracting to the position.

*“Tom is a great addition to HM,”* said Chip Merkel, chairman and CEO of HM Insurance Group. *“His knowledge of our core lines of business and markets is extensive, and I am confident that he will continue to move the company forward as a leader in stop loss and managed care reinsurance.”*





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SLPC 28097 02/17 (exp. 02/19)

Doran came to HM from Medical Risk Managers (MRM), the largest Stop Loss MGU in the country, where he served as the company's president. Prior to that, he held the role of executive vice president at MRM and gained actuarial experience at Aetna, Hartford Life and Aon Hewitt. He has a Bachelor of Science degree in Mechanical and Aerospace Engineering from Princeton University and is a fellow of the Society of Actuaries and a member of the American Academy of Actuaries.

"I'm excited to join the HM team," Doran said. "The company demonstrates a commitment to building long-term relationships with producers and partners -- something very integral to success in this industry. We will continue to deliver on our traditions and promises to protect the financial wellbeing of HM's policyholders."

### 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.

HM Life Insurance Company, HM Life Insurance Company of New York and Highmark Casualty Insurance Company are rated "A-" (Excellent) by A.M. Best Company, one of the country's oldest and most respected rating agencies. HM also consistently has been named to Ward's 50 top life and health carriers based on financial performance. 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 Mahan at [jennifer.mahan@hminsurancegroup.com](mailto:jennifer.mahan@hminsurancegroup.com) and visit [www.hmig.com](http://www.hmig.com).



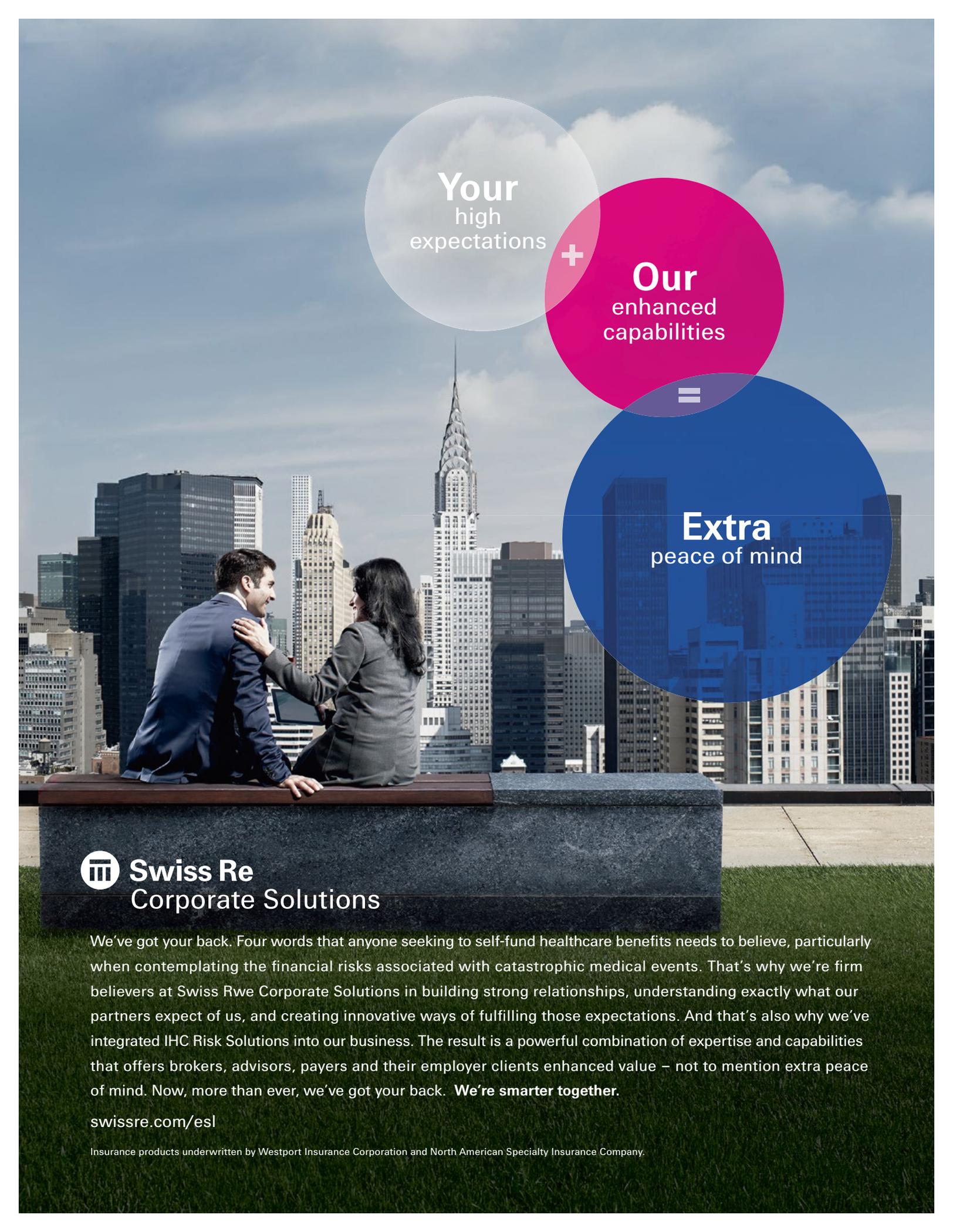
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Insurance products underwritten by Westport Insurance Corporation and North American Specialty Insurance Company.

## Swiss Re's Accident & Health Division Has Two Opportunities for Senior Account Managers

Swiss Re's Accident & Health division is growing! Swiss Re has two opportunities in their Scottsdale, AZ and Marlton, NJ offices for Senior Account Managers to join their team working closely with their Underwriting and Sales teams to facilitate renewals of in force business. You will be joining a fast paced and energetic team. If you are a motivated individual looking to join a leading provider of medical stop loss insurance apply on-line today!

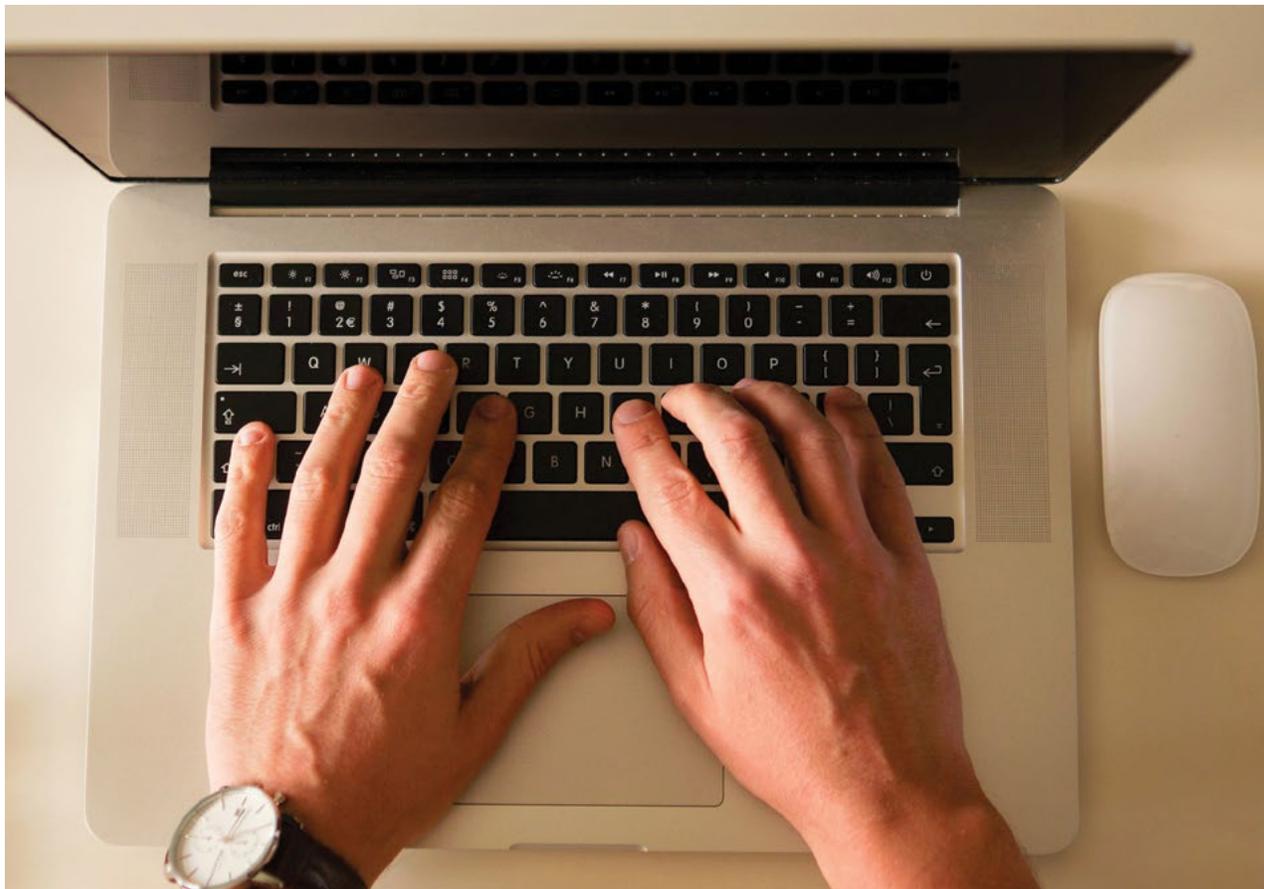
### About the role

Swiss Re Corporate Solutions' Sales team is highly skilled and experienced in building, actively managing and expanding producer relationships. The Senior Account Manager is expected to have an extensive knowledge and background in underwriting and supports the Sales Team through profitable retention and in achieving their retention targets. The Senior Account Manager is also expected to deliver high quality customer service, promoting and enhancing the reputation of the Swiss Re Corporate Solutions and will work closely with their Regional Sales Executive to ensure our producers have clear understanding of our products and procedures.

The Senior Account Manager is the primary contact for Swiss Re Corporate Solutions producers for all day-to-day services issues, which may include but not limited to billing, claims, contracts, and compliance. Producer interactions include phone calls, on site visits and client entertainment. This position is also solely responsible for retention on their assigned block of business.

### About the team

- Responsible for coordinating renewal including policy revision and rate negotiations
- Accountable for maintaining a 75% retention across their assigned block of business
- Complete and in depth knowledge of the underwriting process
- Maintain strong relationships with assigned underwriters to ensure a successful renewal
- Assist in providing training, direction and guidance to the Account Managers in the underwriting process
- Develop and maintain strong producer relationships in collaboration with the Regional Sales



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- Investigate and coordinate correspondence related issues that need other departmental input such as Claims, Policy Issue and Premium Administration
- Verify and complete the Sold Case Confirmation process for new sales and renewals
- Responsible for adding new, update existing and deactivating contacts in DY
- Assist with all other duties as requested and assigned

#### About You

- College degree, or work experience equivalent.
- 5 or more years experiencing Underwriting A&H business or 5 or more years as an Account Manager.
- Ability to travel up to 30% is required.
- Excellent organization skills.
- Able to handle multiple priorities and work effectively under tight deadlines.



### A Long Tradition of Insurance Solutions for Companies that Self-Fund Their Medical Plan

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The underwriting risks, financial and contractual obligations, and support functions associated with products issued by National Union Fire Insurance Company of Pittsburgh, Pa., are its responsibility. National Union Fire Insurance Company of Pittsburgh, Pa., maintains its principal place of business in New York, NY, and is authorized to conduct insurance business in all states and the District of Columbia. NAIC No. 19445. Coverages may not be available in all states.

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- Strong appreciation for the need to meet stated minimum compliance commitments within the timeframes given.
- Strong client focus and service orientation.
- Strong oral and written communication skills in English.
- Experienced negotiator:
- Excellent interpersonal skills; ability to effectively manage a large block of business and achieve goals; collaborative.
- Microsoft suite knowledgeable.

The Company is an equal opportunity employer. It is the practice of the Company to recruit, hire and promote without regard to race, religion, color, national origin, sex, disability, age, pregnancy, sexual orientations, marital status, military status, or any other characteristic protected by law. Decisions on employment are solely based on an individual's qualifications for the position being filled.

During the recruitment process, reasonable accommodations for disabilities are available upon request. If contacted for an interview, please inform the Recruiter/HR Professional of the accommodation needed.

### About Swiss Re

The Swiss Re Group is a leading provider of medical stop loss, reinsurance, insurance and other insurance-based forms of risk transfer. Founded in Zurich, Switzerland, in 1863, Swiss Re serves clients through a network of around 80 offices globally and is rated "AA-" by Standard & Poor's, "Aa3" by Moody's and "A+" by A.M. Best. Visit [www.swissre.com](http://www.swissre.com).

## Silver Members

### AXIS Insurance Hires James Martin and Appoints Russ Madore as Vice Presidents within Its U.S. Property and Casualty Team

AXIS Capital Holdings Limited ("AXIS Capital") (NYSE:AXS) today announced the respective appointments of James Martin and Russ Madore, each as Vice President, U.S. Programs, within AXIS Insurance's Property and Casualty team. Messrs. Martin and Madore will each be responsible for oversight of select AXIS Insurance programs in the Property and Casualty sector. Both are based out of the Company's Alpharetta, Georgia, office, where they report to John Tatum, Executive Vice President and Head of U.S. Programs at AXIS Insurance.

*"These appointments speak to AXIS' commitment to further deepening our scale and relevance in specialty Property and Casualty programs, an area where the Company has long had a strong track record of success,"* said Mr. Tatum.

*"In Jim, we've added a highly seasoned professional and a proven leader who brings deep experience in the construction and transportation categories. We're also pleased to announce the transition of Russ to our U.S. P&C team and look forward to the insights and ideas that he will bring to the U.S. Property and Casualty team from his nearly 15 years with AXIS."*



Mr. Martin has nearly four decades of insurance industry experience. Prior to AXIS, he was an Auto Product Line Specialist in Starr Companies' Environmental Division. Previously, he spent 17 years at CNA, where he was Director of Captives and managed the group captive programs for trucking and roofing, as well as its commercial insurance programs for landcare network and building equipment installation and repair. Before CNA, Mr. Martin held casualty underwriting roles at Continental National Indemnity, Northbrook Property and Casualty, Midwestern Indemnity and The Hartford. He received his Bachelor's degree in communications from John Carroll University, and holds multiple professional certifications, including: Certified Insurance Counselor; Certified Risk Manager; Construction Risk Insurance Specialist, and Transportation Risk Specialist.

Mr. Madore, who had previously held a number of senior financial positions within AXIS Insurance, is one of AXIS' longest-tenured employees, having joined the Company in November 2002. He most recently served as Vice President, Finance Officer, for AXIS Insurance's U.S. Division. He is a graduate of Kean University, where he earned his Bachelor's degree in accounting.

### **About AXIS Capital**

*AXIS Capital is a Bermuda-based global provider of specialty lines insurance and treaty reinsurance with shareholders' equity at March 31, 2017, of \$6.2 billion and locations in Bermuda, the United States, Europe, Singapore, Middle East, Canada and Latin America. Its operating subsidiaries have been assigned a rating of "A+" ("Strong") by Standard & Poor's and "A+" ("Superior") by A.M. Best. For more information about AXIS Capital, visit our website at [www.axiscapital.com](http://www.axiscapital.com). Please be sure to follow AXIS Capital on LinkedIn.*

## **Gold Members**

### **Indigo Seeks National Stop Loss Sales Executive**

Job Title

Indigo National Stop Loss Sales Executive

Summary

As an Indigo Stop Loss Sales Executive, you'll have the support of one of the nation's leading insurance companies and the flexibility and growth potential of running your own business. You'll solve clients' needs through consultative and solution based selling, by building relationships with contacts in your territory to identify, develop and close sales opportunities.





# Choose with Certainty

**Medical stop loss** insurance from Berkshire Hathaway Specialty Insurance comes with a most trusted name and the stability of an exceptionally strong balance sheet. Our executive team has 30 years of experience and a commitment to tailoring solutions and paying claims quickly. All of which is key to ensuring your program's success for years to come. With so many choices, you can make this one with certainty.



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[www.bhspecialty.com/msl](http://www.bhspecialty.com/msl)



### Responsibilities

- Sell Indigo Insurance Services Medical Stop Loss product through insurance brokers, third party administrators and consultants.
- Build and establish relationships with key sources to market our product to some of the nation's leading employers.
- Construct and maintain a business plan for your designated territory based on sales and strategic initiatives.
- Call on existing and potential customers to not only prospect new customers but also to develop a book of business.
- Meet annual targets and individual sales goals.
- Develop internal relationships with underwriters and internal support partners who will assist you in creating specialized plans to meet your clients' needs.

### Qualifications

- Bachelor's Degree from a four-year college or university preferred.
- Previous experience selling the Stop Loss product required.
- Commitment to attaining state required Life and Health agent license.
- Proven relationships with underwriting and technical product expertise.
- Strong organizational skills.

- Strong networking and relationship management skills.
- Excellent listening, presentation, negotiating and communication skills
- A passion to succeed and challenge yourself while building a book of business
- A winning attitude and interested in a career that offers independence, professional growth, and high income potential.
- The successful candidate is driven, self-motivated, consultative and a great problem solver

Interested candidates should send resume to Kim Grace at [Grace.Kim@bcbsma.com](mailto:Grace.Kim@bcbsma.com).

### About Indigo

*Indigo is a full-service insurance agency that offers an extensive suite of specialty insurance products including stop loss, life, disability, vision, travel, accident, critical illness, workers' compensation, and more.. We partner with market-leading insurance carriers that offer outstanding customer service, fast claim payments, and flexible benefits that set them apart from their competition. We only partner with A-rated carriers, and we're a wholly-owned subsidiary of the largest commercial health insurer in Massachusetts—so we'll be there when we're needed the most. Visit [www.indigo-insurance.com](http://www.indigo-insurance.com). ■*



# SIIA Would Like to Recognize its Volunteer Leadership

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Self-Insurer

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# SIIA New Members

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