



NEWS FROM SIIA MEMBERS

2022 APRIL 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@siiia.org.

All submissions are subject to editing for brevity. Information about upgraded memberships can be accessed online at www.siiia.org.

If you would like to learn more about the benefits of SIIA's premium memberships, please contact Jennifer Ivy and jivy@siiia.org.



Unlock the Power of Stop-Loss Automation

Ringmaster Technologies is a cloud-based, healthcare software provider. We build our products **exclusively to simplify, enhance and drastically reduce the complexity and time** necessary for Stop-Loss quoting, contracting, and policy administration. We know the value of client relationships and are committed to helping you make them even stronger.

Our **cloud-based** Stop-Loss software products include:



Deliver productivity and strategic gains to your Stop-Loss marketing and procurement teams.



Auto-generate first dollar medical and Rx reports as well as filings to Carriers and MGUs.

Market → Bind → Administer → Renew

Connect with us today to learn how our suite of products will significantly improve your Stop-Loss process.

330.648.3700 • rmtsales@ringmastertech.com • www.ringmastertech.com



Built exclusively for Stop-Loss

DIAMOND MEMBERS

VÄLENZ® PROMOTES JORDAN HERSH, MBA, TO SENIOR VICE PRESIDENT, CHANNEL DISTRIBUTION

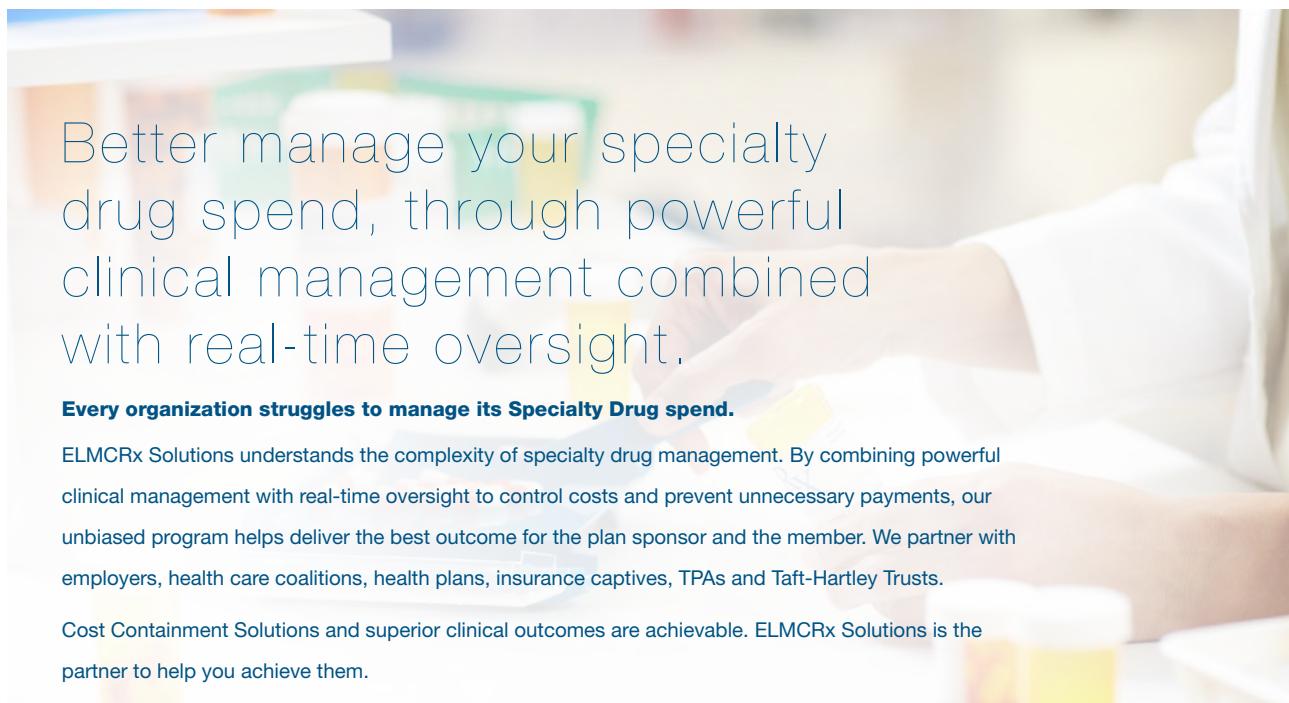
PHOENIX, AZ – In response to continued expansion of the Välenz® ecosystem and rapidly increasing demand for its solutions, Valenz leaders have announced a new position on their executive team: Jordan Hersh, MBA, has been appointed to Senior Vice President, Channel Distribution.

This appointment marks a promotion for Hersh, who initially joined Valenz in 2007 and has served as Vice President, Business Development since early 2019. Hersh is known as an excellent cross-functional leader, bringing the organization together to meet business goals through client-focused solutions and services.

"Since joining Valenz at the very beginning of our ecosystem journey, Jordan has been a catalyst for ensuring our vision, organizational strategies and new product development are delivered to the market," said Nathan Nelson, Chief Revenue Officer. "His passion for success, combined with his proven track record of delivering results, make him the ideal fit to head up channel distribution for our company."

Hersh's career spans 15 years at the intersection of healthcare and technology, focused on solving client and member challenges in the employer-sponsored healthcare domain. He has an MBA from the University of San Francisco School of Management and extensive experience in business development, strategic partnerships, product marketing, account management and sales strategy.

"I believe deeply in the Valenz mission, vision and promise, and I'm excited to take on this new opportunity," said Hersh. "I have a lot of ideas and an incredible team here to further enhance our distribution strategy for the benefit of our clients and their members, as well as our own company and ecosystem partners."



Better manage your specialty drug spend, through powerful clinical management combined with real-time oversight.

Every organization struggles to manage its Specialty Drug spend.

ELMCRx Solutions understands the complexity of specialty drug management. By combining powerful clinical management with real-time oversight to control costs and prevent unnecessary payments, our unbiased program helps deliver the best outcome for the plan sponsor and the member. We partner with employers, health care coalitions, health plans, insurance captives, TPAs and Taft-Hartley Trusts.

Cost Containment Solutions and superior clinical outcomes are achievable. ELMCRx Solutions is the partner to help you achieve them.

CONTACT US TODAY

John Adler jadler@elmcgroup.com | 262 707.1076
Mary Ann Carlisle mcarlisle@elmcgroup.com | 484 433.1412
elmcgroup.com



An ELMC Risk Solutions Company

VÄLENZ® HIRES JEFF SMITH AS DIRECTOR OF PROJECT MANAGEMENT

PHOENIX, AZ – Välenz® announced that Jeff Smith has joined the team as Director, Project Management. Smith, a 33-year industry veteran, will lead all project management initiatives, including but not limited to IT projects, new client implementations, and projects involving mergers and acquisitions.

As a senior-level managed care leader with extensive experience in operations management, product development and sales, Smith has conducted more than 100 implementation projects involving complex products and services. This experience has made him an expert in project planning, process and systems integration, product development, data transfer, and implementation.

"I've known Jeff for many years, and several of us at Valenz have worked with him the past. There is no doubt Jeff will be an outstanding catalyst for growth and expansion, and successful delivery of solutions for our clients," said Rob Gelb, Chief Executive Officer. "His expertise and exceptional project management skills will accelerate success for all stakeholders, and we are thrilled to have him on board."

Smith's career spans three decades in the managed care and payer domains, including 10 years as Senior Project Manager at Coventry Health Care, where he led client implementation projects.

"When you have an in-depth understanding of the needs, objectives and environment at the core of every project, then you can ensure implementation will be successful and results will be optimal," said Smith.

"Results-driven project management is a collaborative process that engages early and often, just like all things Valenz. I'm honored to be on the team and feel this is a perfect fit."



JANET KOCH, VÄLENZ® VICE PRESIDENT OF CARE, ANNOUNCES JUNE 1 RETIREMENT

PHOENIX, AZ – After more than 10 years in care management leadership roles with Valenz®, Janet Koch, RN, BSN, CCM, has announced her retirement beginning June 1.

Janet became Vice President of Care in 2017 after joining Valenz in 2011. Her many accomplishments include transforming the business through clinical platform migrations, leading multiple URAC accreditation certifications for the three core clinical businesses, designing and deploying quality incentive programs for team members, and building the company brand through consistent quality and outcomes for Valenz customers and their members.

“Janet has made such a tremendous impact on Valenz, the Care team and our customers,” said Rob Gelb, Chief Executive Officer of Valenz. “She has been the bedrock of our Care business for 10 years and left her mark on every aspect of our care management operations and team.”

“Although her announcement is bittersweet, we are thrilled for her and her family to embark on the next chapter of her life journey, and we wish her the greatest happiness in the future,” added Amy Gasbarro, Chief Operating Officer of Valenz.

Before joining Valenz, Janet’s career in nursing spanned over 25 years after she served as an air traffic controller in the U.S. Navy for 17 years.

“I have absolutely loved every single day of working side by side with such a talented Care team and the entire extended Valenz family,” Janet said. “I have especially valued my time working with our customers and their members. I’m very grateful to our leadership and my team for the once-in-a-lifetime opportunity I’ve had to make a difference in the lives of so many.”

Janet will continue to work closely with the Valenz team to support a smooth transition.

VÄLENZ® HIRES SUZANN CHESEK AS VICE PRESIDENT OF CARE

PHOENIX, AZ – Valenz® announced that Suzann Chesek, BSN, RN, MBA, CCM, joined the team as Vice President of Care on February 21.

Chesek, who has more than 20 years’ experience with managed care and healthcare organizations, will lead care management operations for Valenz following the retirement of Janet Koch. Over the next three months, Chesek and Koch will work closely to

assure a seamless transition before Koch’s retirement begins on June 1.

Most recently, Chesek was Director of Clinical Operations, Healthcare Management for Trustmark Health Benefits. She also served as Clinical Operations Manager with Holy Spirit Health System and as Hospital Administrator and Clinical Manager Employee Health & Safety with Wellspan Health.

Chesek’s background in clinical operations for managed care is fortified by her strong foundation as an ICU nurse, including roles such as ICU Bedside & Charge Nurse, House Supervisor & ICU Flex Nurse, and PRN ICU RN. With a bachelor’s degree in Nursing from Eastern Mennonite University and an MBA in Healthcare Management from Western Governors University, Suzann is working toward a second master’s degree in Management & Leadership from WGU.

“By leveraging a rich blend of leadership skills and technical expertise throughout her impressive career, Suzann has established herself as a proven leader who thrives in a fast-paced, complex environment,” said Rob Gelb, Chief Executive Officer of Valenz. “She welcomes a challenge and is highly recognized for her superior planning, decision-making and change management capabilities.”

Chesek pointed to her experience in managed care organizations as well as her studies in healthcare management and leadership as great preparation for her new role with Valenz.

“The teamwork, collaboration and leadership model at Valenz clearly align with my vision for the continuous growth

and innovation of care management operations," Chesk said. "As a strong believer in asking "why" to discover what is best for patients, clients and the company, I look forward to further enhancing our culture of partnership and accelerating our ability to deliver smarter, better, faster healthcare for the people we serve."

About Valenz

Välenz® simplifies the complexities of self-insurance for employers through a steadfast commitment to data transparency and decision enablement. To balance the relationship between healthcare quality, advocacy and cost, the Valenz approach aligns the patient, payer and provider. We deliver this synergy through a strong foundation with deep roots in clinical and member advocacy, alongside decades-long expertise in claim reimbursement and payment validity, integrity and accuracy. By establishing 'true transparency' and offering data-driven solutions that improve cost, quality and outcomes for you and your members, Valenz engages early and often for smarter, better, faster healthcare. Visit valenzhealth.com. Valenz is backed by Great Point Partners.

HM INSURANCE GROUP ANNOUNCES KIMBERLY MORSE AS NEW SALES DIRECTOR FOR PHOENIX AND SOUTHERN CALIFORNIA MARKETS

PITTSBURGH – Kimberly Morse joined HM Insurance Group (HM) as director, Phoenix and Southern California Regional Sales. In this role, she will work to grow and maintain the HM Stop Loss book of business in the company's Phoenix Regional Sales territory, which serves Arizona, Colorado, New Mexico, Utah and Nevada, as well as the company's Southern California Regional Sales territory, which serves the Los Angeles and San Diego markets and other Southern California counties.



imagine360

Flexible Health Plan Solutions

- Full service plan administration
- Concierge member support
- Deep cost savings; up to 30%



Your health plan can do better. We promise.
imagine360.com

Morse most recently served as regional vice president of stop loss sales for Western Skies MGU's Western division. Prior to that, she worked as a senior sales executive at Sun Life Financial for almost 11 years, marketing stop loss products since 2014. Additionally, Morse gained significant sales and relationship management experience at Aetna, Aon and other industry leaders.

With more than 25 years of experience in insurance sales, Morse brings a great deal of knowledge to HM, particularly her familiarity with the California and West Coast markets. She has a Bachelor of Arts degree in Psychology from California State University, Fullerton.

About HM Insurance Group

HM Insurance Group (HM) provides insurance and reinsurance coverage to protect businesses from the financial risk associated with catastrophic health care costs. A recognized leader in Employer Stop Loss, the company delivers protection for a range of group sizes. HM also offers managed care solutions, including Provider Excess Loss insurance and Health Plan Reinsurance. HM Life Insurance Company, HM Life Insurance Company of New York and Highmark Casualty Insurance Company are all rated "A" (Excellent) by AM Best Company. 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. Visit hmig.com.

SILVER MEMBERS

**GOOGLE EXECUTIVE LUTZ
FINGER JOINS MARPAI HEALTH
AS PRESIDENT, PRODUCT AND
DEVELOPMENT**

NEW YORK -- Marpai, Inc., an AI-technology company transforming the \$22B Third-Party Administrator market supporting self-funded employer health plans, announced Google Group Product Manager of healthcare analytics Lutz Finger is joining the company as President, Product and Development.

LEARN | PLAN | SAVE | PROTECT

**RECOVERY
DOLLARS**

MULTIPLIED



**THE
PHIA
GROUP**

EMPOWERING PLANS

**FIDUCIARY
DUTY**

SHIFTED

**PLAN
DOCUMENTS**

PERFECTED

**LEGAL
EXPERTISE**

SECURED

www.phiagroup.com | 781-535-5600 | info@phiagroup.com

Lutz is an esteemed technologist with a diverse background in building innovative technology platforms for companies including Google, LinkedIn and SNAP. In this role, he will create and lead a formal product management function. He will direct all product development including internal systems aimed at making Marpai the most efficient payer in the market and AI-driven products that predict costly events and help members live healthier lives.

"Lutz is a visionary leader in our industry, an expert in data science with rich expertise in creating innovative products at the intersection of AI and healthcare," said Edmundo Gonzalez, co-founder and CEO of Marpai.

"We have a shared vision for the evolution of healthcare, and we are delighted that he has agreed to join us on this journey of transforming health plans so we drive costs down and health outcomes up."

"Lutz knows how to turn AI into usable healthcare products with a real value proposition," said Dr. Eli David, Marpai co-founder and Chief Science Advisor. "The high level of AI and healthcare analytics expertise that he brings will help us deliver innovative new products that can reduce costs, enable healthier lives and might even end up on your smartphone."

"In order to help people to live better lives we need to provide a road to better health," said Finger, who starts in his new role at Marpai on February 28th. "I look forward to working alongside some of the most talented AI and deep learning data scientists in the world to create an AI driven approach to proactive healthcare that draws on extensive data analytics and predictive algorithms. AI is needed to augment and improve healthcare services and Marpai is leading the way in changing the company health plan by driving costs down and improving member health."

At Google, Lutz led the health products group where he used AI to create products to improve consumer health and reduce healthcare costs. "There's a real revolution going on in how we consume healthcare services, pay for them and leverage historical data to deliver new value," says Marpai co-founder and Chairman Yaron Eitan. "This process requires a lot of creativity, data and data science. Lutz not only brings the right experience and skills, he also brings a unique vantage point from which to envision the future."

Residing in the San Francisco Bay Area, Mr. Finger brings over 20 years of diversified experience in data science and product management, most recently at Google as a Group Product Manager in health products where he spearheaded life-changing products using AI and healthcare data.



Lutz has served on the faculty at Cornell University's S.C. Johnson School of Business, and is a regular contributor to Forbes Magazine, where he writes about AI and deep learning. His book "Ask Measure Learn," was published in 2014 and serves as a non-technical guide on how to extract significant business value from big data.

He serves as an advisor and board member at several data-centric corporations in Europe and the US, including Deutsche Bank. He has an MBA from INSEAD as well as an MS in quantum physics from TU Berlin.

About Marpai, Inc.

Marpai, Inc. (Nasdaq: MRAI) is a technology company bringing AI-powered health plan services to employers providing health benefits to employees. Primarily competing within the \$22B TPA (Third Party Administrator) sector serving self-funded health plans and representing over \$1T in annual health care claims, Marpai's SMART services focus on reducing claims costs, lowering reinsurance premiums, and elevating care quality for plan members. Marpai's proprietary deep learning algorithms predict potential near-term health events for members to prevent costly claims and improve health outcomes. Operating nationwide, Marpai offers access to provider networks including Aetna and Cigna, and partners with brokers and consultants. Visit marpaihealth.com.



STARLINE

From day one, StarLine's differentiator has always been its people. Now, decades later, we are at a position of strength because of our people. Our team goes above and beyond to create and sustain solutions to match today's constantly evolving needs. There is no part of our process that is not underscored by a dedicated, collaborative, and approachable group — powered to propel you forward to achieve your goals.

starlinegroup.com | (508) 809-3179



STOP LOSS | CAPTIVE | PAYOR | PROVIDER | GROUP ACCIDENT



Depend on Sun Life to help you manage risk and help your members live healthier lives

Behind every claim is a person facing a health challenge. By supporting members in the moments that matter, we can improve health outcomes and help employers manage costs.

For nearly 40 years, self-funded employers have trusted Sun Life to quickly reimburse their stop-loss claims and be their second set of eyes, looking for savings opportunities. But we are ready to do more to help members in the moments that matter. We now offer care navigation and health advocacy services to help your employees and their families get the right care at the right time – and achieve better health outcomes. Let us support you with innovative health and risk solutions that benefit you and your medical plan members. It is time to rethink what you expect from your stop-loss partner.

Ask your Sun Life Stop-Loss Specialist about what is new at Sun Life or [click here to learn more!](#)

[STOP-LOSS](#) | [DISABILITY](#) | [ABSENCE](#) | [DENTAL/VISION](#) | [VOLUNTARY](#) | [LIFE](#)

The content on this page is not approved for use in New Mexico.

For current financial ratings of underwriting companies by independent rating agencies, visit our corporate website at [www.sunlife.com](#). For more information about Sun Life products, visit [www.sunlife.com/us](#). Stop-Loss policies are underwritten by Sun Life Assurance Company of Canada (Wellesley Hills, MA) in all states except New York, under Policy Form Series 07-SL REV 7-12. In New York, Stop-Loss policies are underwritten by Sun Life and Health Insurance Company (U.S.) (Lansing, MI) under Policy Form Series 07-NYSL REV 7-12. Product offerings may not be available in all states and may vary depending on state laws and regulations.

© 2022 Sun Life Assurance Company of Canada, Wellesley Hills, MA 02481. All rights reserved. Sun Life and the globe symbol are trademarks of Sun Life Assurance Company of Canada. Visit us at [www.sunlife.com/us](#). BRAD-6503-u SLPC 29427 01/22 (exp. 01/24)

SELF INSURANCE INSTITUTE OF AMERICA, INC. 2022

BOARD OF DIRECTORS

CHAIRWOMAN OF THE BOARD*

Kari L. Niblack, JD, SPHR

CEO

ACS Benefit Services
Winston Salem, NC

CHAIRWOMAN ELECT*

Elizabeth Midtlien

Vice President, Emerging Markets
AmeriHealth Administrators, Inc.
Bloomington, MN

TREASURER AND CORPORATE

SECRETARY*

John Capasso

President & CEO
Captive Planning Associates, LLC
Marlton, NJ

DIRECTORS

Thomas R. Belding

President
Professional Reinsurance Mktg. Svcs.
Edmond, OK

Amy Gasbarro

Chief Operating Officer
Välenz
Phoenix, AZ

DIRECTORS (CONT.)

Laura Hirsch

Co-CEO
Aither Health
Carrollton, TX

Deborah Hodges

President & CEO
Health Plans, Inc.
Westborough, MA

Lisa Moody

Board of Directors Chair
Renalogic
Phoenix, AZ

Shaun L. Peterson

VP, Stop Loss
Voya Financial
Minneapolis, MN

SIEF BOARD OF DIRECTORS

Nigel Wallbank
SIEF Chairman

Dani Kimlinger, PhD, MHA, SPHR,
SHRM-SCP, SIEF President

DIRECTORS

Freda H. Bacon

Les Boughner

Alex Giordano

Virginia Johnson

* Also serves as Director



Shift your plan into high gear

There is more to successful RBP
than savings.

- Claim Auditing
- ERISA Appeal Management
- Member Advocacy
- Litigation Defense



With ClaimDOC you're in the driver's seat to create a rich and sustainable healthcare plan. Our approach to elevate the member experience, while diligently managing risk is what sets us apart.

Learn more at Claim-doc.com or call (888) 330-7295

SIIA NEW MEMBERS

APRIL 2022

REGULAR CORPORATE MEMBERS

John Howard
Service Manager
CANARX
Windsor, ON

Jeffrey Erickson
Chief Executive Officer
Crescent Health Solutions
Asheville, NC

Carol Adams
Chief Risk Officer
EB Employee Solutions/
The Difference Card
White Plains, NY

Jeremy Berk
Performance
Firefly Health
Watertown, MA

Nick Severino
VP, Marketing
First Stop Health
Chicago, IL

Christine Marx
Divisional Senior Vice President
Great American Insurance Group
Cincinnati, OH

Jennifer Ramella
Director of Marketing
gWell, Inc.
Lexington, MA

Keith Somers
Co-founder, CRO
HealthCorum
Boston, MA

Lizbeth Sanchez
Marketing Coordinator, Senior
IngenioRx
Morristown, NJ

Jessica Palvino
Attorney
Mitchell Williams
Austin, TX

Joe Bush
Chief Strategy Officer
NavMD
Overland Park, KS

Amber Herron
Marketing Project & Event Manager
Papa, Inc.
Miami, FL

David Voorhees
CEO
True Captive Insurance
Overland Park, KS

SILVER CORPORATE MEMBERS

Ron Houghton
Sales Director, Data Insights
Benefitfocus
Charleston, SC

Phillip Berry
CEO
Northwind Pharmaceuticals
Indianapolis, IN

Laurent Laor
CEO
Viveka Health
New York, NY