



2023 MARCH 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.

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



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DIAMOND MEMBERS**THE PHIA GROUP NAMES
JOANIE VERINDER AS SERVICE
STRATEGIST**

CANTON, MA—The Phia Group continues to demonstrate its commitment to provide the industry’s best cost containment services, by proudly announcing the hiring of Joanie Verinder as its Service Strategist.

As The Phia Group’s Service Strategist, Joanie will serve as a client liaison and achieve a new level of collaboration, regarding everything from service updates to current regulatory news.

Advocating for the company’s clients, Joanie will communicate the industry’s needs to The Phia Group’s leaders and monitor the company to ensure it is always excelling on behalf of its clientele. When a new issue, rule, or development creates need, Joanie Verinder will ensure The Phia Group takes action on the industry’s behalf.

Ms. Verinder is no stranger to The Phia Group, having previously served as the Compliance Officer for Group and Pension Administrators (GPA) TPA. There, Joanie routinely interacted with The Phia Group as a client. Additionally, Ms. Verinder served as a leader and President of Health Care Administrators Association (“HCAA”), and in that and other industry roles often worked with The Phia Group to ensure association members were receiving

important industry news, updates, and education from Phia. “After working as a client with the Phia team for 20 years, and witnessing firsthand their passion and commitment to helping our industry, I’m excited to become a member of that team. I look forward to evolving from a ‘Phia Phriend’ to becoming a member of the ‘Phia Phamily’ ... and assisting all of our loyal clients.”





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Senior Vice President of Consulting, Jennifer McCormick, said, “We are thrilled to welcome Joanie to the Phia team! In her new role Joanie will be working tirelessly to continue to build relationships while ensuring our teams deliver the highest levels of value and quality for our partners and clients. We look forward to this new year with Joanie on the team.”

The company’s CEO, Adam Russo, added, “I have personally known Joanie for decades... longer than most of our own team members. For most of my career, I’ve looked to her as a friend, advisor, innovator, and voice of the industry. Adding her to our roster takes us to a new level. I couldn’t be happier – not only for myself and The Phia Group, but for our clients... all of whom are going to benefit from her presence.”

THE PHIA GROUP ANNOUNCES UJWAL SHRESTHA, VP BUSINESS ANALYTICS & DATA SERVICES AND CAITLIN LANKSTON, SENIOR DATA SCIENTIST

CANTON, MA —The Phia Group continues to reinforce its commitment to offering elite technology and advanced analytics by recently hiring Ujwal Shrestha, VP, Business Analytics and Data Services, and Caitlin Lankston, Senior Data Scientist.

With an impressive track record leading data analysis and data strategy work in the self-funded industry as well as in management consulting firms, Ujwal will expand Phia’s data-driven decision algorithms that optimize business process efficiencies, data identifications and client results.

He will serve as a conduit to executive leaders by applying techniques such as Artificial Intelligence (AI), Machine Learning (ML) and predictive analytics to present data insights in a digestible and actionable format.

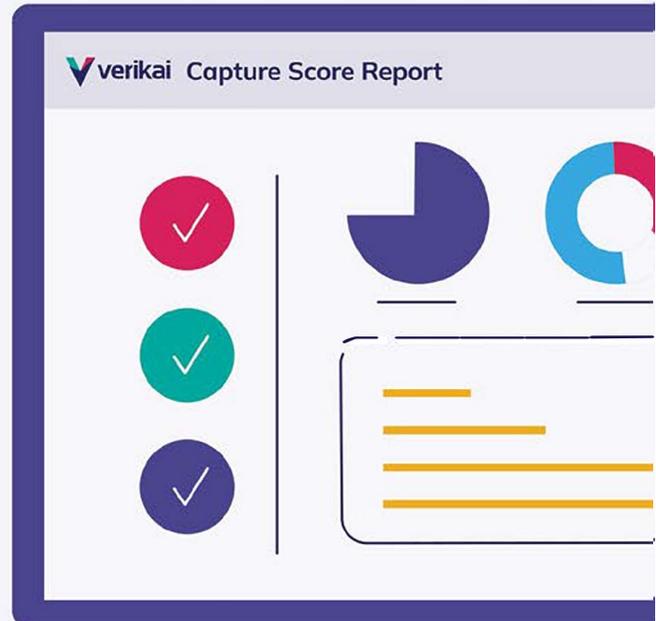
As Phia is poised for considerable growth, Ujwal will channel his data analysis skills toward pushing technical boundaries to spur innovation while spearheading analytics geared toward optimizing recovery opportunities.





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As Phia's Senior Data Scientist, Caitlin, a graduate of the University of Montana, where she received her master's degree in Statistics, will be engaging in hands-on data analysis work relying heavily on Python and Tableau reporting as a means of optimally aggregating data,

streamlining internal processes, and leveraging Predictive Analytics and advanced algorithms. Prior to joining Phia, Caitlin handled case prioritization work for DataSmart Health Solutions.

"Advanced and predictive analytics offer extremely exciting potential at Phia in our recovery efforts allowing us to look at our data in a new prescriptive and proactive way," says Caitlin. "Until now, Phia relied on strong industry knowledge and robust logic to prioritize case workflow. Predictive analytics, however, leverages machine learning to discover hidden patterns and trends. Identifying these patterns

"The main reason I joined Phia is I wanted to be in a growing company in the healthcare industry," states Ujwal. "I believe I can help the company make better business decisions that are data-driven, based on the expansive healthcare claims data we have."

Adds Chief Operating Officer Joe Montalto, "We are delighted to welcome Ujwal to The Phia Group. With his diverse background in the self-funded space and his experience at D2Hawkeye, Inc., Ujwal will be an invaluable resource to our company as we look to take our Data Services Group to the next level. I am very excited to see Ujwal grow into this role and continue to help Phia make a positive impact for our clients."



HCAA

'23

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will help Phia find new business opportunities and answer complex questions.”

To learn more about The Phia Group, what it is doing to empower plans, and to learn more about its Provider Relations solutions, please contact Garrick Hunt by email at ghunt@phiagroup.com or by phone at 781-535-5644.

About The Phia Group

The Phia Group, LLC, headquartered in Canton, Massachusetts, is an experienced provider of health care cost containment techniques offering comprehensive claims recovery, plan document and consulting services designed to control health care costs and protect plan assets. By providing industry leading consultation, plan drafting, subrogation and other cost containment solutions, The Phia Group is truly Empowering Plans. Contact Garrick Hunt at ghunt@phiagroup.com or 781-535-5644 and visit www.phphiagroup.com.

VÄLENZ® HEALTH PROMOTES KEVIN O'DONNELL TO SENIOR VICE PRESIDENT, PRODUCT & MARKETING

PHOENIX, AZ – Välenz® Health is pleased to announce that Kevin O'Donnell, MPA, has been promoted to Senior Vice President, Product & Marketing.

In his new role, O'Donnell will lead Valenz marketing initiatives to fuel growth and visibility for the organization. He also will continue to work with Chief Product Officer Maurice

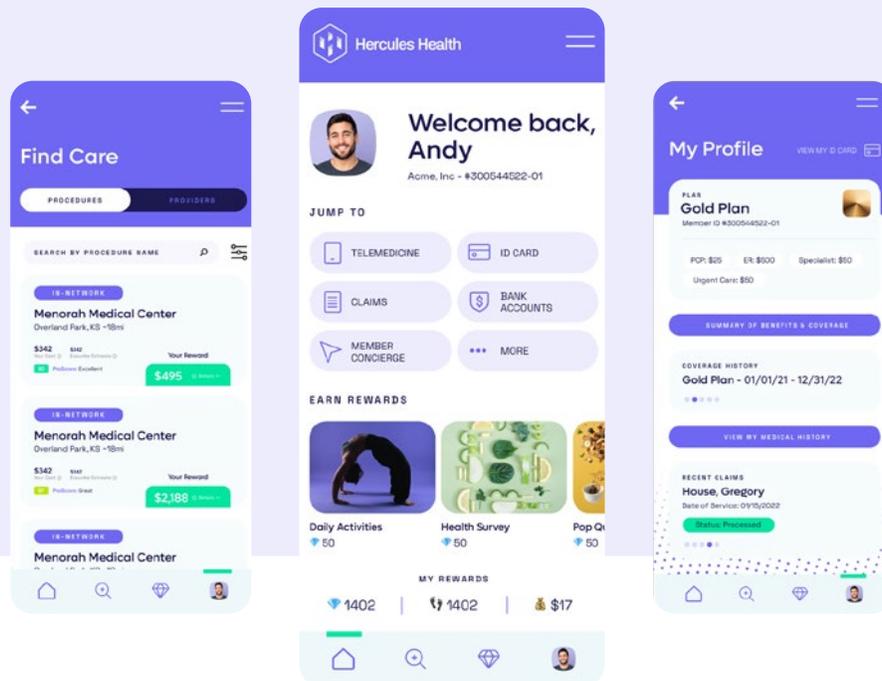




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Steenland in driving innovations and further advancing the Valenz Healthcare Ecosystem Optimization Platform suite of integrated, interactive solutions.

“Kevin has brought a tremendous vision and creative mindset to Valenz, and we are thrilled that his role is expanding,”

Steenland said. “Through his ongoing leadership efforts, we look forward to developing new strategies

and further underscoring our ability to change the trajectory of rising plan costs, enhance member experiences, and drive better health outcomes.”

O’Donnell, who lives in Newark, Del., joined Valenz in 2022 as Vice President, Enterprise Solutions. He has been highly involved in expanding and integrating how Valenz delivers solutions for providers and payers that assure the validation, integrity and accuracy of reimbursement and claims, as well as care and member advocacy program enhancements.

Previously, O’Donnell was Managing Director of Operations for Evolent Health and held other leadership positions there in operations, claims quality and payment integrity. He earned a master’s degree in Public Administration with an emphasis in health and human services from the University of Arizona’s Eller College of Management.



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About Valenz® Health

Valenz® Health simplifies the complexities of self-insurance for employers through a steadfast commitment to data transparency and decision enablement powered by its Healthcare Ecosystem Optimization Platform. Offering a strong foundation with deep roots in clinical and member advocacy, alongside decades of expertise in the validation, integrity and accuracy of claims, and a suite of risk affinity solutions, Valenz optimizes healthcare for the provider, payer, plan and member. By establishing “true transparency” and offering data-driven solutions that improve cost, quality and outcomes for employers and their members, Valenz engages early and often for smarter, better, faster healthcare. Valenz is backed by Great Point Partners. Visit www.valenzhealth.com

TALON WELCOMES JOE TORINA AS VP OF STRATEGIC PARTNERSHIPS

Portsmouth, NH – TALON, a leader in providing innovative technology solutions for the rapidly evolving healthcare industry, announced that Joe Torina has joined its quickly expanding team as Vice President of Strategic Partnerships.

With a robust range of professional experience in account management, marketing, and business development, Torina comes to TALON from WLT Software Enterprises, where he spent 3 1/2 years serving as Marketing Director/Business Partner Relations, and, most recently, Director of Business Development.

“As the industry continues to adapt and evolve around the requirements and implications of Transparency in Coverage requirements and a new participant-driven ecosystem, TALON will evolve right along with it,” said TALON Co-Founder, President, and CEO Mark Galvin. “Essential to this evolution, Joe’s range of experience and proven track record in business development will be invaluable to fostering and growing our strategic partnerships in the months and

years to come. We’re thrilled to have him on the TALON team.”

“Hitting the ground running with TALON has already been exceptionally rewarding.” Torina said in a statement. “The healthcare industry is undergoing monumental changes that not only demand a dynamic, end-to-end technology solution, but also the right strategic approach. I look forward to building strong, lasting relationships to better serve both current and future TALON clients, as well as the broader industry as a whole.”

TALON NAMES CATHERINE KLEHM AS VICE PRESIDENT OF PROFESSIONAL SERVICES

Portsmouth, NH – TALON, a leader in providing innovative, scalable technology solutions for the rapidly evolving healthcare industry, announced that Catherine Klehm has joined its growing team to serve as Vice President of Professional Services.

With more than two decades of diverse experience, Klehm has a proven track record of success in leading client services operations to increase customer loyalty, expanding solution footprints within accounts, turning around projects or departments,



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A large, white, 3D-style text 'STOP LOSS' is superimposed on a curved concrete bridge structure. The bridge has a metal railing and is set against a background of blue water. The text is the central focus of the lower half of the advertisement.

**Employer Stop Loss:
Limit Health Care Exposure.
Advancing Self-funding Together.**

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and creating alignment and collaboration between sales, product management, services, and engineering to drive excellence and savings in execution.

Klehm comes to TALON from Uptake, where she served as Senior Director of Professional Services and was responsible for leading the development of project management, staffing/ utilization, implementation processes, and approach to identify measurable targeted outcomes for customers.

“I’m excited to join such a talented and dynamic team and

look forward to expanding TALON’s already stellar reputation as a leader and pioneer in the healthcare technology space,” Klehm said in a statement. “Essential to this mission will be driving continued innovation, addressing critical business needs, increasing client satisfaction, and further building on the tremendous value that TALON brings to the table for every customer.”

About TALON

TALON’s mission is to educate, empower, and incentivize the American healthcare consumer to meaningfully reduce costs and create a healthier ecosystem. We’ve built the ultimate suite of software services designed to fulfill the requirements of the Transparency in Coverage Rule and No Surprises Act. Simply put, TALON protects healthcare stakeholders from overpaying for care while enabling seamless integration into the Payer’s existing architecture, all without disruption or distraction. Our tools create free-market dynamics, starting with our ability to ensure full compliance with all mandates and extending through our consumer-driven MyMedicalShopper platform. Visit www.talonhealthtech.com

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

By supporting people in the moments that matter, we can improve health outcomes and help employers manage costs.

For over 40 years, self-funded employers have trusted Sun Life to help them manage financial risk. But we know that behind every claim is a person facing a health challenge and we are ready to do more to help people navigate complicated healthcare decisions and achieve better health outcomes. Sun Life now offers care navigation and health advocacy services through Health Navigator, to help your employees and their families get the right care at the right time – and help you save money. Let us support you with innovative health and risk solutions for your business. 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.

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GOLD MEMBERS

HEALTHCARE MANAGEMENT ADMINISTRATORS (HMA) NAMED BEST PLACES TO WORK

BELLEVUE, WA -- Built In announced that HMA was honored in its 2023 Best Places To Work Awards. Specifically, HMA earned a place on Seattle's Best Places to Work list. The annual awards program includes companies of all sizes, from startups to those in the enterprise, and honors both remote-first employers as well as companies in large tech markets across the U.S.

"We are thrilled to be receiving this award for the second year in a row. This award is a testament to the value we place on empowering our people to bring their best selves to work. Our people come to HMA from diverse backgrounds and experiences, and together we achieve great results. Being in the company of the other winners on this list is an honor," says Lindsay Harris, President and CEO of HMA.

Built In determines the winners of Best Places to Work based on an algorithm, using company data about compensation and benefits. To reflect the benefits candidates are searching for more frequently on Built In, the program also weighs criteria like remote and flexible work opportunities, programs for DEI and other people-first cultural offerings.

"It's my honor to congratulate this year's Best Places to Work winners," says Sheridan Orr, Chief Marketing Officer, Built In.

"These exemplary companies understand their people are their most valuable asset, and they've stepped up to meet the modern professional's new expectations, including the desire to work for companies that deliver purpose, growth and inclusion. These winners set the stage for a human-centered future of work, and we can't wait to see that future unfold."





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About Built In

Built In is creating the largest platform for technology professionals globally. Monthly, millions of the industry's most in-demand professionals visit the site from across the world. They rely on our platform to stay ahead of tech trends and news, learn skills to accelerate their careers and find opportunities at companies whose values they share. Built In also serves 2,000 customers, innovative companies ranging from startups to those in the Fortune 500. By putting their stories in front of our uniquely engaged audience, we help them hire otherwise hard-to-reach tech professionals. Visit www.builtin.com

health plan dollars. With over 30 years of industry experience and a team of proactive, highly skilled professionals, we help employers improve their bottom-line. We call this "Winning Together" because we're on the same side and share the same goals – healthier outcomes for members at the best possible value. Visit www.accesshma.com

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HMA is Proving What's Possible in Healthcare®. Our team of caring experts design and deliver high-quality, innovative, and affordable health plans for self-funded employers. We are the service-oriented partner employers trust to protect two of their most important assets, their people and their



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6 DEGREES HEALTH WELCOMES COLIN JEX AS VICE PRESIDENT OF BUSINESS DEVELOPMENT

6 Degrees Health is pleased to announce that Colin Jex has joined the company as VP of Business Development.

We want to welcome Colin Jex to the 6 Degrees Health family. Colin is a 30-year veteran of the Group Benefits industry. His career began as a group benefits broker in the Detroit, Michigan, market.

In 2002, he was appointed Vice President of Sales for a Michigan-based TPA offering FSA, Cobra, HRA, and Consolidated Billing service solutions for UBA partner firms.

After that, he worked as a Senior Sales Executive for Henry Ford Health System and Rogers Benefit Group. As Regional Sales Director for Cofinity and First Health Networks, he established regional and national TPA relationships. He continued to expand his TPA experience with self-funded business sales prior to joining 6 Degrees as VP of Business Development focused on TPA markets.

“We are very pleased to have Colin Jex as a member of our team,” said Heath Potter, Chief Growth Officer, “His depth of knowledge and relationships will be very valuable to our channel partners and their clients.”

Colin can be reached at colin.jex@6degreeshealth.com and 248.207.0434.

About 6 Degrees Health

Ensure Fairness and Transparency in Healthcare. We set healthcare free from the constraints of traditional models and out-of-date billing practices. With our clinical expertise, industry experience, and proprietary evidence-based technology, we help solve some of the most complex issues in healthcare. Visit www.6degreeshealth.com

UME NAMES JEFF DIEKEMA AS NEW CHIEF REVENUE OFFICER

Philadelphia, PA – Underwriting Management Experts, one of the largest privately held MGUs, has named Jeff Diekema as new Chief Revenue Officer.

UME is pleased to continue a pattern of growth with the addition of industry-veteran Jeff Diekema to the executive team. As Chief Revenue Officer, Jeff will be responsible for the overall business development of UME. He will focus on diversifying revenue streams and leading the sales team to bolster growth, while creating a strategic sales plan for the future.

Adding experience and depth to the management team, Jeff will maintain UME’s position as an industry leader and grow existing relationships with partners.

Jack McCarthy, President of UME, said, “We are extremely excited to add Jeff to our team. He brings a wealth of knowledge to the table and will be a huge asset to the growth of UME.”

Jeff has been in the benefits industry for over 30 years, in roles ranging from sales and sales/marketing management to TPA operations, underwriting and sales support, and product development.

Prior to his role at Underwriting Management Experts, Jeff held vice president positions at cost containment companies and national Third-Party Administrators. He has extensive senior management experience with several health plans, an MGU, TPAs, and consulting firms.

Jeff’s experience is in self-funded risk management and alternative funding arrangements with an emphasis on transparency and innovative payment and savings initiatives. He has utilized current technology to maximize the cost impact of well-designed and

integrated plan designs. Jeff has stated, "I am thrilled to be a part of UME family and look forward to using my skills and experience to help expand the products and services offered here."

Jeff received his bachelor's and master's degrees from Central Michigan University with degrees in psychology, physical education, and sport psychology. He also holds the Certified Employee Benefits Specialist (CEBS) designation for the International Foundation of Employee Benefit Plans (IFEBP) and the Wharton School at the University of Pennsylvania.

We look forward to the new momentum that Jeff will provide as UME continues to develop innovative and flexible solutions to meet the needs of our partners.

About UME

As a full-service Managing General Underwriter (MGU), UME offers underwriting, policy binding, contract issuance, premium collection, and claims payment. UME provides excellent customer service by focusing on responsiveness and flexibility to meet the needs of our partners. Contact Robert Glorioso, Chief Operating Officer, at rglorioso@umexperts.com and visit www.umexperts.com

SILVER MEMBERS

BLACKWELL CAPTIVE SOLUTIONS WELCOMES NEW NATIONAL VICE PRESIDENT, SALES

CHICAGO -- Blackwell Captive Solutions, an innovative medical stop loss captive domiciled in South Carolina and sponsored by Carrick Capital Partners, announces Tina Willenborg as a new National Vice President, Sales.

"Our team brings unrivaled knowledge to the growing and complex stop loss market. Tina is a purposeful leader who complements our culture and brings a deep understanding of medical stop loss captives," said Kari L. Niblack, President of Blackwell Captive Solutions. "She will play a lead role in driving our growth strategy and is a terrific addition to the Blackwell team."

Willenborg comes to Blackwell Captive Solutions with more than 26 years of industry and medical stop loss experience. She has been a leader in her past roles, serving as Assistant Vice President Stop Loss at Xchange Benefits, LLC, Assistant Vice President at Employer Benefit Underwriters, Inc., and Assistant Vice President, Business Development at Arch Insurance Group.

"Employer medical stop loss is a financial risk product at its core. Thus, funding medical stop loss risk through a captive enables companies to offset future costs and reinvest the returns to enhance

benefits," said Willenborg. "At Blackwell Captive Solutions, we take great pride in helping clients make informed benefit decisions. Why not recognize and deploy surplus more efficiently with Blackwell?"

About Blackwell

Headquartered in Chicago, Blackwell Captive Solutions is a medical stop loss captive that differentiates by delivering essential stability with desired flexibility via access to cutting-edge health and well-being solutions for our clients. We've proven that combining employers' buying power with tailoring freedom maximizes the impact of self-insurance and reduces market volatility associated with the ultimate cost of healthcare benefit delivery to employees. Contact Kari L. Niblack, JD, SPHR, at KariN@BlackwellCaptive.com and visit www.blackwellcaptive.com ■

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MARCH 2023

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Marshfield, WI

CAPTIVE MEMBERS

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