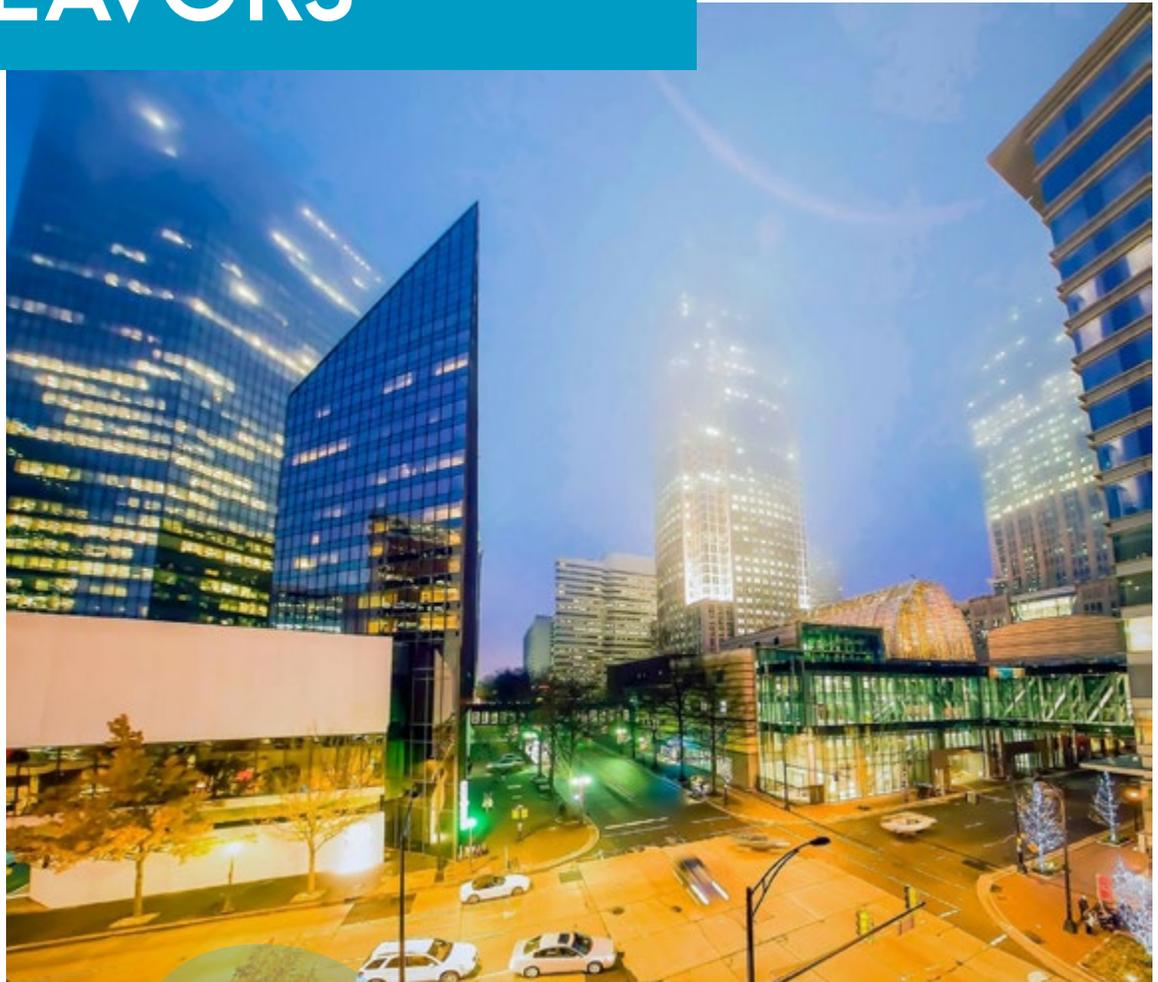


SIIA ENDEAVORS



SIIA's 2018 Self-Insured Health Plan Executive Forum will take place March 18-20th at the Westin Charlotte in Charlotte, North Carolina.

This popular SIIA educational and networking event brings together senior executives representing key business partners supporting self-insured group health plans, including third party administrators (TPAs), stop-loss carriers/MGUs, brokers/consultants, captive managers and leading service providers, with the objective of promoting improved collaboration in order to grow the self-insurance marketplace in a responsible way.

Come in early to participate in the Self-Insurance Educational Foundation's (SIEF) Golf Event. Monday, March 18 from 12:00 pm - 3:00 pm. SIEF is 501(c)(3) non-profit organization affiliated with the Self-Insurance Institute of America, Inc. The mission of the foundation is to create and underwrite educational initiatives that serve to promote a greater awareness and understanding of self-insurance/alternative risk transfer.

Past Foundation-sponsored educational initiatives and projects have included:

- Producing and maintaining a website that serves as an online hub for objective information about self-insurance (www.siefonline.org)
- Self-insurance briefings for congressional staff members on Capitol Hill
- 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
- Published: "Understanding Group Self-Insured Workers' Compensation Funds"
- Published: "Understanding Self-Insured Group Health Plans"
- Published: "Managing Corporate Risks Through Captive Insurance Programs"

You can help support the SIEF by participating in their TopGolf event! TopGolf is a premier golf entertainment complex where the competition of sport meets Charlotte's local hangout. No golfing ability? No problem! Topgolf is a game that anyone can play (and win). Score points by hitting micro-chipped golf balls at giant dartboard-like targets on an outfield. The closer you get your ball to the center or 'bullseye' and the further the distance, the more points earned. The fun and games don't stop there; come and indulge in a delicious hosted lunch and drinks. No shoes, no club rentals, no skill needed, what could be better?

Registration for this event is \$199 per person and can be done when registering for the conference. This is a great way to support the foundation dedicated to ensuring the development of tomorrow's leaders in the self-insurance/ART industry, all while having fun!

Also at the beginning of the Self-Insured Health Plan Executive Forum is a special mini-program for the SIIA Future Leaders (SFL) on Monday, March 18th from 1pm-4pm. This mini-program will combine a structured networking session with a featured speaker specifically geared for SFL members (under age 40).

SIIA launched the SIIA Future Leaders (SFL) initiative in fall of 2018, designed to encourage talented younger professionals to become involved with the association and the self-insurance industry.



There is no cost for SFL mini-program and you do not need to be signed up for the Executive Forum (full conference), but advance separate registration is required. Registration for the SIIA Future Leaders Forum will include access to the Legislative/Regulatory Update session and Executive Forum's welcome reception that evening.

The special SFL mini-program sessions include:

Power 90 Networking

One of the keys to becoming a successful future leader is to develop a professional network of other up and upcoming "A players" within the self-insurance industry. Get a head start on building such a network by participating in a structured, 90-minute networking session where you are assured to make multiple new connections.

Working SIIA - What You Need To Know, with Duke Niedringhaus, Senior

Vice President, J.W. Terrill, a Marsh & McLennan Company

Many of the most successful executives within the self-insurance industry have been active SIIA members – that is no coincidence. SIIA offers multiple involvement and networking opportunities that can help you build a positive professional reputation, contribute to your organization's financial success and advance your education. The featured speaker for this session has done it all within SIIA for more than a decade– committee member, committee chairman, speaker, moderator and director. Based on this experience, he will share his insights on how to "work SIIA" to further your career advancement goals while adding current value to your employer.

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If you have Future Leaders in your company that you would like to direct to this initiative, or if you are a future leader yourself, we invite you to join the SIIA Future Leaders LinkedIn Group at www.linkedin.com/groups/12098226. More information on SIIA's Future Leaders initiative and the SFL mini-program at the Self-Insured Health Plan Executive Forum, including registration, can be found at www.siaa.org.

There will also be a pre-conference session Legislative/Regulatory Update pre-conference session on Monday, March 18th. Ryan Work, Vice President, Federal Government Relations for SIIA and Adam Brackemyre, Vice President, State Government Relations for SIIA will provide the latest updates on federal and state legislative/regulatory developments affecting the self-insurance marketplace.

The full conference educational program kicks off Tuesday, March 19th with **Welcome Remarks & The Hot Industry Issues Audience Poll** moderated by SIIA President & CEO, Mike Ferguson.

We will get off to a fast and fun start by offering your anonymous opinions on the hottest industry issues of the day and see aggregated audience results in real time via SIIA's attendee polling technology. You will also have the opportunity select which exhibitors should be given a five-minute live pitch opportunity during the hosted luncheon.



Other sessions in the educational program include:

Technology Strategies Shaping Tomorrow's TPAs, with Cheryl Kellond, CEO & Co-Founder Apostrophe Health and Alex Arnet, Chief Commercial Officer, Lucent Health

This session will feature a recent entrant into the TPA marketplace who has incorporated specific technology strategies from day one, along with a more established TPA who has real world experience transforming legacy systems as part of a growth strategy under-pinned by technology. These two presenters will share their insights on what successful TPAs of tomorrow will look like.

Preparing Employers for Stop-Loss Captive Programs, with Joe DiBella, EVP - Managing Director, Health & Benefits Practice, Conner Strong & Buckelew and Jesse Crary, Attorney, Primer Piper Eggleston & Cramer

A growing number of employers are considering joining or forming a group stop-loss captive with other like-minded employers to help control the cost of offering employee health. In order to maximize the advantages of making this shift, employers

need to understand the ins and outs of structuring a self-insured plan that will position them to take full advantage of being grouped with other individually self-insured employers. They also need to know how to vet and compare various types of group stop-loss captives in order to select a program best suited to meet their goals from a financial, risk management and governance perspective. This session will feature broker/advisor and legal perspectives on how employers should prepare and position themselves to optimize the upside of participating in a group medical stop-loss program.

Self-Insurance Claims Classroom, with *Adam V. Russo, Esq., CEO, The Phia Group, LLC*

During this interactive session, attendees will be presented with various real-world scenarios where something has gone wrong as part of the claims administration and/or stop-loss reimbursement process and then be requested to provide their anonymous opinions on the appropriate course of action via SIIA's real-time polling technology. Expert analysis will be provided for each scenario along with commentary about audience polling results.



Making it Work with the Third Wheel – Legacy Vendor Arrangements, with *Brian Connelly Director of Product Development & Strategy, Gilsbar, LLC, Jonathan Logan, President, Logan & Associates of Louisiana, Inc., Dan Myers, Vice President of Client and Business Development, EBMS, Erin Weenum, Chief Strategist, Employee Benefits, Leavitt Group*

An increasingly common friction point between TPAs and brokers/ consultants working together to set up a new self-insured health plan, and/or making substantive changes to an existing plan, is when one of them has an established vendor and/or provider relationship that they insist must be part of the deal. This session will discuss real world examples provide practical advice on how best deal with these “Third Wheel” situations.

Beyond Disruptors and Rock Stars – Let’s Talk Execution, with *Mark Gaunya, Co-Owner and Chief Innovation Officer, Borislow Insurance, Kevin Trokey, Founder, Q4intelligence, Jim Rinere President, CWI Benefits, LLC, Arlene Cayetano, FLMI, President & CEO, Managing Member, Greymatter Risk Management, LLC*

There has been a lot of positive energy recently in the broker/advisor space related to self-insured health plans, which is a welcome development for our industry. But while health care “disrupters” and “rock stars” are great, effective execution and coordination makes all the difference when transitioning employers into self-insurance, or when making substantive changes to a current plan.



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Others in Development: MATERNITY, ANOREXIA, GALL BLADDER REMOVAL, GENDER AFFIRMATION SURGERY, OUTPATIENT CARDIAC, ENDOMETRIAL CANCER/HYSTERECTOMY, CAR-T THERAPY, COCHLEAR IMPLANT *and more*

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This panel will discuss what is going right and where there is room for improvement on how brokers/advisors, TPAs and stop-loss carriers work together in serving the interests of plan sponsors.

TPA Best Practices – Peer Review Session, with Ron Dewsnup, President, Allegiance

SIIA is in the early stages of developing a best practices framework for its TPA members, with a specific focus on claims administration and stop-loss reimbursement submissions. A preliminary draft will be shared with the attendees at this session in order to solicit feedback to assist with further development. All attendees are invited to participate.

Stop-Loss Carrier/MGU Best Practices – Peer Review Session, with Pat Campola Windsor Strategy Partners, Inc.

SIIA is in the early stages of developing a best practices framework for its stop-loss/MGU members, with a specific focus on claims review/reimbursement. A preliminary draft will be shared with the attendees at this session in order to solicit feedback to assist with further development. All attendees are invited to participate.

There will also be an “Audience Choice” Hot Topic Open Discussion. Attendees will choose the topic via real-time polling for an open discussion among session attendees.

We look forward to seeing you in Charlotte! More information, including registration and sponsorship opportunities can be found at www.siaa.org. ■

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Data Availability

95%

Actual vs Target

Evolution	Metric	Actual vs Target	Actual	Target	Products positioning
	Revenue	<div style="width: 100%;"></div>	\$1.2M	108.7%	
	Profit	<div style="width: 80%;"></div>	\$850.3	71.0%	48
	Avg. Order Size	<div style="width: 95%;"></div>	96.0%	96.0%	50
	On Time Delivery	<div style="width: 95%;"></div>	96.0%	96.0%	
	New Customers	<div style="width: 95%;"></div>	15,433	145.0%	

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