



SIIA ENDEAVORS

SIIA FUTURE LEADERS VIRTUAL MENTOR CONNECTION FORUM

Presented by the SIIA Future Leaders (SFL) Committee, this interactive virtual event has been designed to connect younger SIIA members (under age 40) with several of the most successful senior self-insurance/captive insurance industry executives in a “speed-mentoring” format. Attendees will have unique access to those who can provide practical career advancement advice, including tips on how they can be more valuable to their employers.

This format will also encourage interaction among attendees with a kickoff virtual networking reception that includes your favorite at home drink recipes, giveaways, and an extinguished group of professional executives to further accelerate your success in the self-insurance/captive insurance industry.

*Due to logistical restrictions of the format, attendance will be limited to 100 participants, so please register early if you would like to participate.

No Solicitation Environment

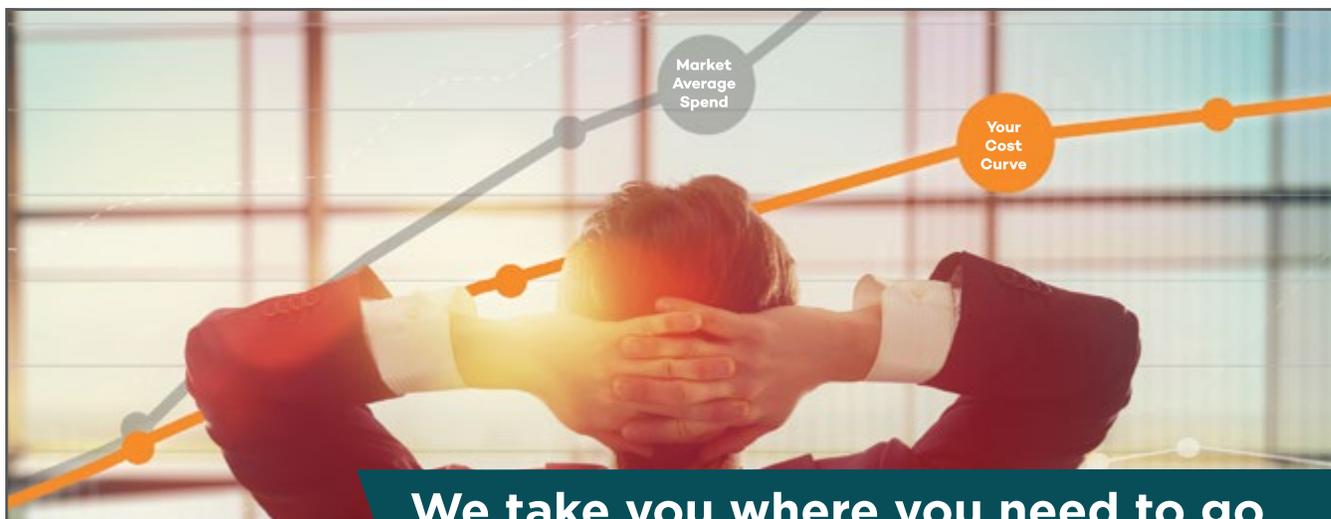
SIIA intends for this to be a “safe” environment with regard to employment solicitations. In this regard, we ask that attendees refrain from approaching any of mentors regarding employment opportunities with their companies and that mentors likewise not engage in employment discussions with any attendees. For more information visit www.siiia.org.

The following list of mentors have confirmed their participation. As you will see, they represent all segments of the self-insurance marketplace (group health, captives & workers' compensation) and each of them have been very successful in their respective careers as well as being highly involved with SIIA in various capacities. Additional mentors may be announced closer to the date, so please check www.siiia.org periodically to see the latest line-up.

Les Boughner
Chairman
Advantage Insurance Management
(USA) LLC

Les entered the insurance business in 1977. He held senior positions with FM Global, AIG, CNA, Zurich and Willis prior to joining Advantage Insurance Management (USA) LLC. He holds a Bachelor of Mechanical Engineering (with Distinction) from Carleton University, Ottawa, Canada, and an MBA from York University, Toronto, Canada.

As Chairman of Advantage Insurance Management (USA) LLC, Les is

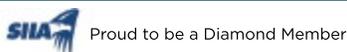


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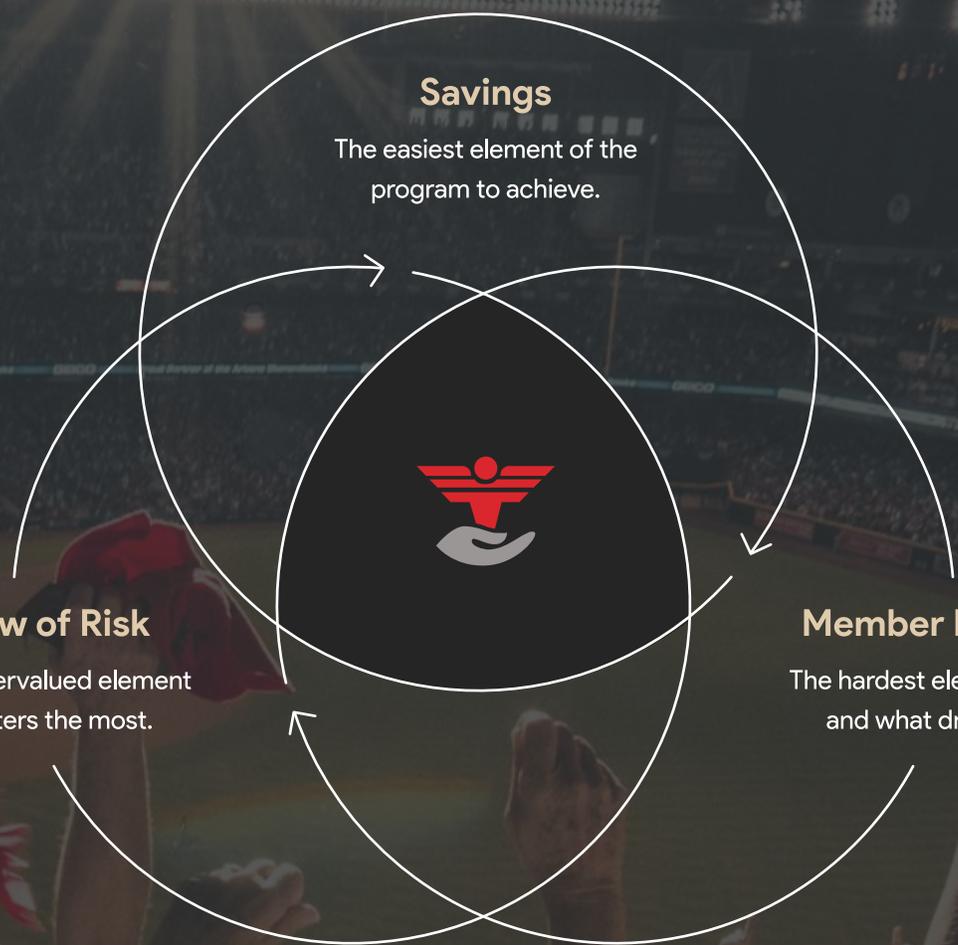
responsible for developing Advantage’s captive insurance and related businesses globally, including its direct underwriting activity at Lloyd’s reinsured by Advantage Property & Casualty Company SPC. In his role as Managing Director of Willis Global Captive Practice, Les was responsible for the profit and growth of “The Americas” Practice with offices in Barbados, Vermont, Cayman, Bermuda and Hawaii. He is Past Chairman of the Captive Insurance Companies Association (CICA), is on the Program Committee of the World Captive Forum and Chairman of the Self Insurance Information Association (SIIA).

Pat Campola
President, Campola Consulting
Director, New Business Development
Windsor Strategy Partners, Inc.

Pat Campola is a Principal at Windsor Strategy Partners, Inc. as well as President of Campola Consulting and Intermediary Services. Pat has 30 years of senior management experience in the insurance industry. He is Past President of several organizations that include Alden Risk Management Services, a John Alden Insurance Co. subsidiary, Lincoln Re. Risk Management Services, a Lincoln National Insurance Co subsidiary, and John Alden International.

Jerry Castelloe
Principal
Castelloe Partners

Jerry Castelloe founded Castelloe Partners, LLC in January 2015. As a foundation for his consulting practice, Jerry has used his expertise, relationships and experiences in the self-funding industry to assist clients with a variety of strategic endeavors. He has assisted a variety of clients, including employers, high performance networks, cost management specialists and claims administrators with strategic planning management, product development, talent identification, mergers and acquisitions, and ACA compliance.



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Marshall College.

He is a member of the Board of Directors of Unimerica Insurance Company of New York (Executive Committee member).

Richard is a past member of the HMO Board of Directors of Oxford Health Plans and the National Advisory Councils of Aetna, CIGNA, HealthNet, and

Jerry gained valuable experience in all aspects of healthcare and self-funding during 31 years of leadership at CoreSource, Inc., a large national Third Party Administrator. During his tenure at CoreSource, Jerry provided leadership to all functional and geographical areas. Most recently, as Regional President, he led the SouthEast region and was responsible for business development, client management and administration for the clients in the region. In addition, Jerry provided strategic consulting advice to several of CoreSource's major national clients, including the establishment and relationship management of CoreSource's State High Risk Pool strategy.

Richard J. Fleder
President and CEO
ELMC Risk Solutions, LLC

Which he co-founded in 2013. ELMC is the latest venture in a series of successful insurance related entities he has created including Comprehensive Benefits (CBSC), in 1978, and Tesco Benefits, LLC, in 1995. Since 2013 Richard has built ELMC through the acquisition of best-in-class MGUs with funding partnership from the international investment firm J.C. Flowers & Co. Richard is a graduate of Franklin &

UnitedHealthcare. He is a former member of the Legislative Council of NAHU and the founder of the Empire State Healthcare Coalition.

Liz Mariner-Ford
Senior Vice President, National Health Care Practice
Risk Strategies Company

Liz brings to Risk Strategies over 25+ years of insurance and reinsurance experience. She is skilled in health, life, disability, the worksite market and a wide range of accident products, on both a group and individual basis. Well known for her talent in advising and collaborating with clients on growth strategies, product diversification and



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risk management techniques, Liz is equally recognized for her strong relationships within global reinsurance markets.

Liz started her career in 1982 at General Reassurance, the former life division of General Re, as an Account Manager in the Financial Reinsurance Unit and last held the position of Vice President of Treaty Operations for all individual and group life, accident and health lines of business for its successor company, Life Reassurance Corporation of America, subsequently acquired by Swiss Re.

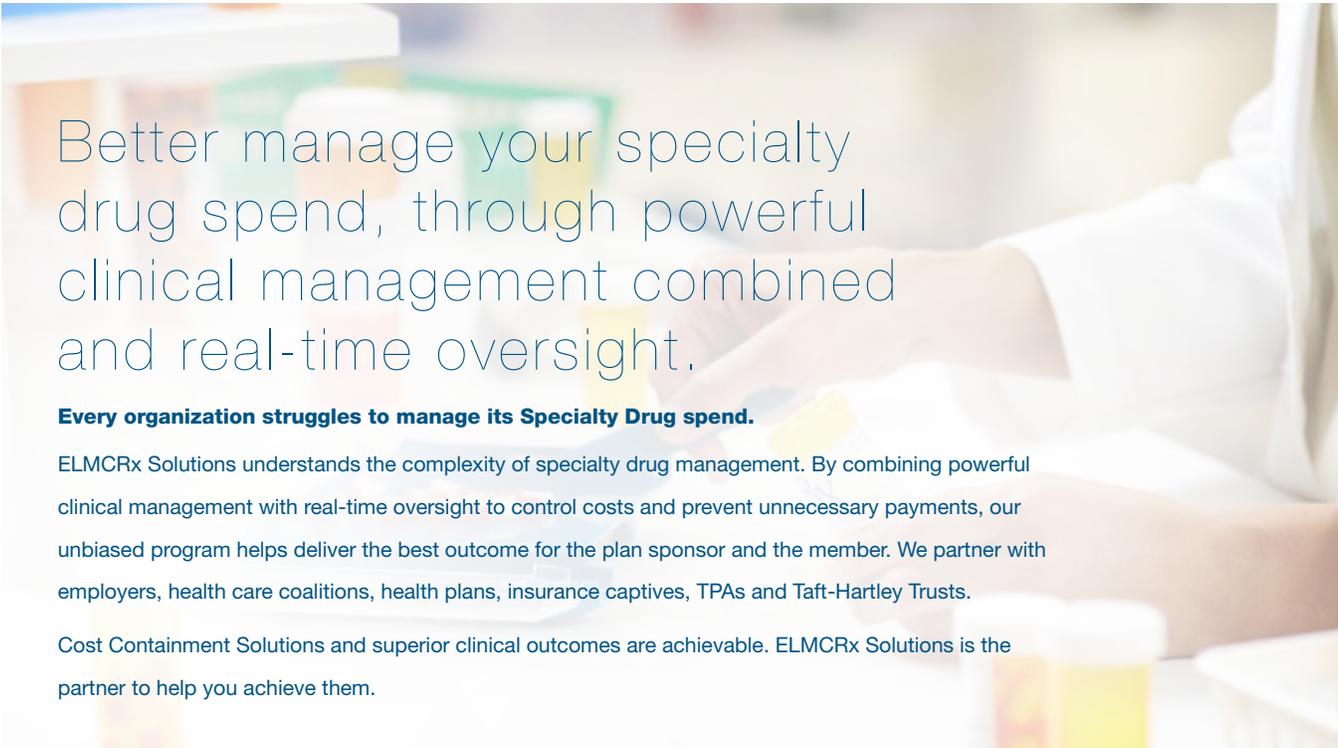
In 1992, Liz joined Towers Perrin, where she became a Principal and held the position of Vice President responsible for business development in the Risk & Financial Services' Life, Accident and Health Reinsurance Practice.

Liz is currently the Chair of the SIIA International Committee and a former Director of SIIA, holds an MBA from the University of Connecticut, a Bachelor of Science Degree in Pre-Med from Boston College, and professional designations as a

Chartered Financial Consultant (ChFC), a Chartered Life Underwriter (CLU), a Health Insurance Associate of America (HIA), a Certified Employee Benefit Specialist (CEBS), and a Fellow of the Life Management Institute (FLMI).

Rob Gelb
Chief Executive Officer
Välenz

As an accomplished executive leader with a consistent record of strategic and tactical success across his 30+ year career, Rob excels at identifying and developing talent within scaling organizations and achieved exponential growth and results for all stakeholders.



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His diverse background includes direct experience in healthcare, managed care, network development, banking and finance, mergers and acquisitions, and property/casualty insurance. Rob is a CPA, earning his public accounting degree from Hofstra University in 1989, and has held leadership positions at several prestigious firms, including York (now Sedgwick), Coventry (now CVS/Aetna), CIGNA and PNC Bank.

Laura Hirsch
Cofounder & co-CEO
Aither Health

Laura Hirsch is a visionary and innovative senior executive who has more than 30 years of experience in self-funding business strategy, private labeled business process outsourcing (BPO) services, mergers & acquisitions, operational excellence and business development.

Deborah Hodges
President and CEO
Health Plans, Inc.

As President, Deb leads the company's diversification growth strategy and represents the organization to parent company, Harvard Pilgrim Health Care (HPHC). Deb

works with the board of directors and senior management of both companies to develop long-range goals, strategies, plans, and organizational policies.

Deb has held a number of senior executive positions over the past two decades and was a key participant during our acquisition by HPHC in 2005. Her experience and skills have directly impacted product marketing, business development, sales revenues and strategic planning, and the company's recent risk management growth endeavors.

Deb joined Health Plans in 1993 to build our self-funded sales team as regional sales executive, serving as development architect as Health Plans transitioned operations to primarily administer self-funded health plans. Deb has since served numerous roles in the sales area including Vice President of Sales and Marketing. As Senior Vice President, Deb's other responsibilities included Care Management and Health strategies, Reporting and Analytics, and Operations.

Earlier in her career, Deb served as an Underwriting Manager for R.E. Moulton, Director of Marketing at Mt. Vernon Associates, and was a member of the sales team at Blue Cross/Blue Shield Massachusetts.

She works closely on HPHC's self-insured line of business strategy, serves on the Executive Leadership Committee



for HPHC and is a Government Relations Committee Member for the Self Insurance Institute of America, Inc. (SIIA).

Deb holds a Bachelor of Science degree in Health Care Administration.

Steve Kelly
Co-founder and CEO
ELAP Services

Steve Kelly is the Co-founder and CEO of ELAP Services, a leading healthcare solution for self-funded employers based in Wayne, Pa. He is a recognized expert in the insurance, employee benefits and risk management industry, bringing more than three decades of experience solving his clients' complex healthcare challenges.

Kelly has expertise in the nuances of the healthcare and benefits industry, an unyielding passion to bring transparency and fairness to medical costs, and the

desire to empower employers to be good stewards of healthcare and benefits programs.

Kelly has presented at the World Health Congress and other notable industry events and has been featured as an expert commentator for National Public Radio, Newsweek, FOX Business, The New York Times, and several other media organizations.

Most recently, Kelly was recognized as a winner of the 2019 EY Entrepreneur of the Year Award in Greater Philadelphia and was named a national finalist in the Financial Services category.

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Liz Midtlien
Vice President, Emerging Markets
AmeriHealth Administrators, Inc.

Elizabeth (Liz) Midtlien has spent nearly 30 years as health insurance industry professional. Liz has built, influenced, and led multi-disciplined teams across multiple domains, including sales, marketing, strategy, underwriting, and operations. In her current role leading Emerging Markets development for AmeriHealth Administrator, Liz is responsible for developing, executing, and overseeing programs that support diversified revenue streams through partnerships, joint ventures, and acquisitions. Based in AmeriHealth Administrators' Minnesota office, Liz also leads activities related to strategy development, service model optimization, and client and partner relationships in MN and across the country.

Before joining AmeriHealth Administrators, Liz most recently served as Senior Vice President at HM Insurance Group, where she led diverse teams focused on managed care reinsurance, product development, project management, and integrated marketing and communications. Her experience also includes roles as a Chief Marketing Officer and Sr. VP of Sales for the Starline Group, a leading Managing General Underwriter. She has also served as Vice President Employee Benefits Producer at a leading national brokerage firm and held leadership positions with nationally known health reinsurers and a large national third-party administrator.

Liz received her Master of Arts in industrial relations from the University of Minnesota and her Bachelor of Arts in business administration from the University of Wisconsin – River Falls. She is active in the Self-Insured Institute of America (SIIA) and a participant and volunteer in showing her American Quarter Horses. She resides in MN and is supported in all her endeavors by her husband Jim and adult son Jack.

Lisa Moody
President and Chief Executive Officer
Renalogic

Since 2008, Lisa has been President and CEO for Renalogic. Lisa is responsible for overseeing and directing all strategic initiatives as they relate to People, Process and Product, while ensuring the strength of our organizational health. Lisa places a high priority on our ability to demonstrate and carry out the Renalogic mission and vision.

She has been instrumental in leading the development of core values that reflect our commitment to our clients and to the industry. Lisa consistently works to create a diverse and satisfying work experience for our growing employee base. A second generational family-owned company, Lisa has been with Renalogic since its inception in 2002. She encourages and leads the disruptive entrepreneurial spirit for positive change that continues to drive the evolution of Renalogic today.

Lisa has been a longstanding member of SIIA (Self-Insurance Institute of America, Inc.) and was instrumental in promoting Renalogic, as she was one of the first cost containment consultants for SIIA Diamond members. She is also a long standing member of HCAA (Health Care Administrators Association) and an active advocate and supporter within the self-insured community to help promote industry initiatives. Lisa graduated from the University of Massachusetts Dartmouth and is a highly respected leader for change management in the health care industry.

Mark Schmidt
Head of TPA & Payer Solutions and
Workers' Compensation
Prodigy Health Group

Mark Schmidt is the head of TPA & Payer Solutions, which includes Meritain Health, American Health Holding, First Health and Aetna Signature Administrators specialty businesses, and Workers' Compensation.

Mark joined Aetna in 2007 to lead the insurer's Strategic Resource Company (SRC), which provides limited health and related employee benefits to part-time and hourly contract workers. In 2009, he joined the Local Employers and Customers segment where he served as a local market head with oversight and responsibility for the Arkansas, North Carolina, South Carolina and Tennessee markets.

Prior to Aetna, Mark spent 13 years with CoreSource, the last 10 years as president. While serving as president at CoreSource, he also held the role of executive vice president for Trustmark, the parent company of CoreSource, leading both its operations and large group medical business. Additionally, Mark served two terms on the Board of Private HealthCare Systems (PHCS) including one term as chairman. Prior to his time at CoreSource, he spent 12 years in various financial roles with multiple insurance companies.

Harry Tipper, III
Chief Operating Officer – Insurance
CaptiveOne Advisors LLC

Harry Tipper, III currently is the Chief Insurance Operating Officer for CaptiveOne Advisors LLC (a financial services firm focused on and with the expertise required to assess, develop, and manage captive insurance and reinsurance companies successfully).

former President and Chief Executive Officer of Lyon's Gate Reinsurance Company, Ltd. ("Lyon's Gate Re") a Class III, Bermuda reinsurance company licensed under the Act and the Segregated Accounts Act to offer reinsurance and segregated account (or rent-a-captive) cells and served on the Board of Directors of Su Vino Holdings, Inc. (an insurance and reinsurance consulting firm affiliated with ISG Group, Ltd.).

In order to keep registration cost low for our younger attendees, we invite SIIA member companies to consider becoming an event sponsor. This a perfect involvement opportunity who don't typically sponsor/exhibit/advertise through SIIA but want to support a great cause and want to be recognized for it. Contact Justin Miller at jmiller@siaa.org for details. ■



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Harry previously was a founder of and