Employee Benefits Mastermind Bootcamp

Perrysburg, OH

Wednesday May 17th, 2017: 1:00 to 5:00 and Thursday May 18th: 8:00 to Noon

Hilton Garden Inn • 6165 Levis Commons Blvd • Perrysburg, OH

Wednesday, May 17th

Frank Stichter

About Frank Stichter, MHP: Frank is an innovative and successful professional and leader in the field of health benefits, specializing in partially self-funded plans, and related benefits and programs. Frank had his own Agency, Creative Insurance Resources, Inc. for 14 years, worked for the Hylant Group in Toledo for 19 years and became Vice President Employee Benefits, and was Co-Founder and Sr. Vice President of HyHealth LLC. Frank was recruited to move and work in Colorado in 2009 and recently formed his own company Strategic Healthplan Consulting LLC.

Frank is married to Christie, and they have 4 children. Frank is an avid skier, golfer, fisherman, and loves to do just about anything outdoors.

Every business relies on advice and the recommendation from their brokers or consultants – right? It's a matter of trust and the right relationships. But at the end of the day, how do you know you are getting the proper, thorough, and accurate information for YOUR business? Are YOU being limited because of the limitations, expertise, or some other motivation by YOUR broker or consultant? How do you know for sure?

The entire Employee Benefits world, especially in Healthcare, Pharmacy, and Total Rewards, is changing so fast, it's increasingly expensive, and can be so complex, that the purpose of the Employee Mastermind Group is to uncover, inform, and educate CEOs, CFOs, COOs, Business owners, HR Professionals, and others to proven cutting edge programs and opportunities to minimize risk and maximize savings.

Frank will introduce the EXCITING & NEW Mastermind program – how to enroll, what you get, what you'll learn, and all the details. Some of the topics that will be covered throughout the year in the Mastermind will be:

- Reference Based Pricing
- PBMs – how to compare
- Specialty drug programs
- Teledoc programs
- Level funded programs
- Advocacy and concierge services
- Stop Loss
- On site near site clinics
- Compliance
- Access to HR information
- HRIS and payroll systems
- Fiduciary compliance
- Preparations for DOL audits
- Long Term Disability contracts
- ERISA preemption
- Wellness and disease management
- Direct contracting
- Total Rewards

Shelly O’Grady

Shelly O’Grady is a Regional Vice President, Sales and is responsible for consultative selling and participates in new business development for CoreSource’s Central region. Shelly joined CoreSource in 2001 and is a seasoned professional with 16 years of experience in the employee benefits arena. Throughout her tenure at CoreSource, Shelly has held various roles in sales, client management and claims/operations. Her well rounded professional experience lends her the ability to consult and provide impactful solutions to problems facing employers of all sizes and industries.

Did you know that 1 in 5 insured Americans have problems paying their medical bills? Medical expenses can be overwhelming and potentially catastrophic. What happens when your employee and their family members experience a large, unexpected medical expense? Are they prepared?

Average consumer deductibles have doubled in the last 10 years and as a result, consumers skip care which result in gaps in care resulting in more serious and expensive conditions. For those that do seek care, they get multiple bills from different providers and don’t know what they actually owe causing confusion about what to pay and what not to pay. Simplicity solves the multi-faceted problem for members, employers and providers. Simplicity Complete is a service that pays member’s medical expenses on their behalf and sends them one consolidated monthly statement instead of multiple bills from various providers. The program allows the freedom to schedule a payment that fits their budget with 12 months interest free. For those members that want control over their own balance bills, Simplicity On-Line Payment Manager offers an easy, convenient secure tool to view and pay medical expenses on-line with their credit, debit, FSA or HSA card. Both programs provide financial incentives for participation that can be used towards the following plan year. The best yet, the program is free for both the employer and the member!

Bill Stafford

Bill is a native of Indianapolis, Indiana where he attended Indiana University - Purdue University at Indianapolis (IUPUI) as a business major. In addition to Indiana University he also attended Friends University in Wichita, Kansas where he received his Bachelor of Science degree in Human Resource Management.

For more than 30 years, Bill has been involved in the financial services market focused primarily employee and executive benefits. Additionally, he has been a consultant in these areas offering his services to corporate clients of all sizes. He has held positions as a Sales Executive, Sales and Marketing Director, Vice President of Sales and Marketing, Vice President of Business Development, and Vice President of Financial Institution Marketing for a major Third Party Marketer. Bill has held senior positions with a major national healthcare insurance company and has directed sales and marketing efforts of two large regional Third Party Administrators.

Bill is a Principal and the President and C.O.O. of Rx Help Centers, a national prescription drug advocacy company located in Indianapolis. Bill's recent history and prior to joining Rx Help Centers he served briefly as a Senior Consultant for Grouppo Marcucci and the seven years prior to that he was Vice President of Member Services for United Benefit Advisors (UBA) in Indianapolis, IN. UBA is an aggregation of over 145 of the nation's leading independent employee benefit advisory firms and is a Member-owned organization. In his role, Bill is responsible for UBA's Health Plan Benchmarking Survey (the largest in the U. S.) and two national Employer Opinion Surveys. In addition, Bill was the staff liaison responsible for managing Carrier and Vendor relationships for all the traditional and worksite benefit products, tools, and services UBA had available in support of their Owner Firms.

Bill is a Chartered Life Underwriter (CLU), Chartered Financial Consultant (ChFC) and Certified Health Consultant (CHC). He was recently a Sales Executive for Paragon Life Insurance Company; a MetLife Company subsidiary located in St. Louis where he specialized in providing executive group carve-out programs for the physicians and highly compensated senior executives of large corporations and medical practice groups. Some of Paragon and Bill's clients included, The Cleveland Clinic, University of Virginia Health Services Foundation, The Alton Ochsner Clinic, Cooper Clinic, Carolina's HealthCare System, Intermountain Health Care, Peace Health, and the Washington University of St. Louis Medical School.

Bill has been a longtime volunteer of The American Cancer Society. He is a past President of the Shawnee County Kansas Board of Directors and served as a Director, during the inaugural year, of the newly formed Heartland Division Board, which is the governing body for The American Cancer Society in Kansas, Missouri, Nebraska and Oklahoma.

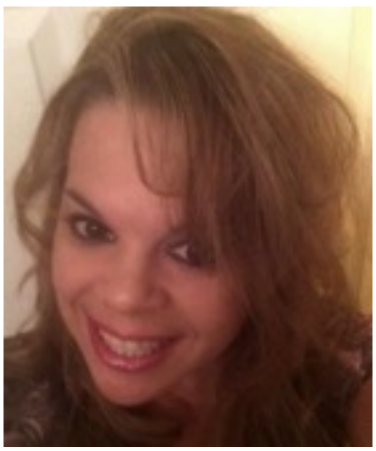
Bill has two adult children and he and his wife currently reside in Zionsville, a northern suburb of Indianapolis.

"Rx Help Centers, LLC brings to self-funded employers an entirely new way to deal with high cost maintenance Brand and Specialty medications through individual prescription advocacy for their employees and dependents. We like to say that when Rx Help Centers successfully advocates for employees/dependents covered by their self-funded medical plan that we “accidentally” save their employer hundreds of thousands, and in some cases, millions of dollars.

Rx Help Centers has access to hundreds of millions of dollars of financial support through manufacturers, non-profits, public and private foundations who provide assistance to individuals throughout the U.S..

Find out how your employees, and ultimately your company, can benefit from Rx Help Centers years of expertise in Prescription drug advocacy.”

Sherri Tetachuk



Sherri has over 20 years in the healthcare industry, this includes working with self-funded, fully funded, and workers compensation plans. Sherri began her medical career as a Provider Relations Manager for Liberty Mutual. There she managed a team of Provider Relations Representatives and developed Return to Work Programs for the physician community. She was also the liaison between her team of nurses, claims examiners, and the physicians & attorneys who worked with Liberty Mutual.

Prior to working for Renalogic, Sherri pursued her passion for golf and began working at The Coeur d’Alene Resort Golf Course. She worked diligently to obtain her LPGA Teaching Credentials and was promoted to the Head Teaching Professional for the Golf Academy at The Coeur d’Alene Resort. She implemented golf programs for the Special Olympics and developed a Ladies Night Golf Clinic, all while being top sales producer for Callaway Golf.

Sherri is distinguished by her passion for business & optimal medical outcomes for plan members, her focus on collaborative team building, and her commitment to meeting customer and market demands.

Sherri’s current role with Renalogic is to help her clients identify and mitigate the risk of Chronic Kidney Disease at all stages. Sherri provides monthly data analysis and custom reporting for each of her clients based on their own data to help them understand their current and ongoing risk across the spectrum of renal disease.

Sherri works closely with the Medical Management Team of Renal Nurse Coaches to identify and provide early intervention with plan members to significantly improve medical outcomes and reduce the medical spend for the plan across all stages of renal disease.

Plans that participate in both the Chronic Kidney Disease Care Management & Dialysis Cost Containment Programs, realize the best medical outcomes for their members and savings to the plan.

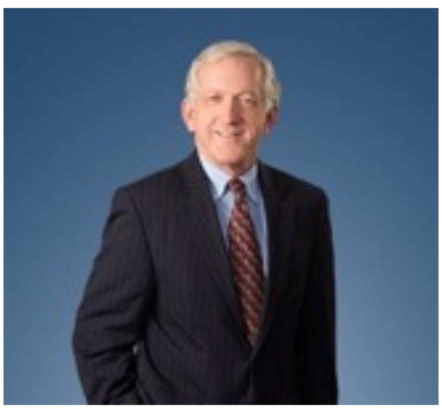
Renalogic, an end to end solution for renal care

Members with Chronic Diseases that can lead to kidney failure (dialysis) make up a small percentage

of your plan's population, but can utilize a very high percentage of your plan's medical dollars. Learn how you too can help your members avoid kidney failure (dialysis) to produce a healthier members, higher work productivity, and large savings to the plan. Sherri will show you how she can help you identify and mitigate risk of Chronic Kidney Disease at all stages. If you already have members in dialysis, Renalogic has a proven solution that can provide an average savings of 87% off of billed charges. With diabetes, hypertension, and heart disease rapidly on the rise in our country, this is a presentation you will want to see!

Thursday, May 18th

Scott Hamner



Scott E. Hamner advises clients regarding the creation of effective and tax-efficient employee benefits, cash compensation and deferred compensation that will attract, retain and motivate employees to best accomplish the company's goals. He also assists clients with IRS and DOL plan audits, advises regarding compensation and benefit law compliance, and assists clients in correcting retirement plan administrative/operational errors.

Mr. Hamner has than 35 years of experience in tax and employee benefits matters. Prior to joining the Firm, he was a principal in an employee benefits consulting company where he advised on all aspects of employee benefits law and was employed by several businesses in the glass industry. At Eastman & Smith his practice concentrates on employee benefits including health care, retirement, deferred compensation, HIPAA, designing ESOPs and managing the ESOP redemption liability, and executive compensation.

Mr. Hamner often has been quoted in the press regarding employee benefits matters. Additionally, he has spoken on the topics of structuring qualified retirement plans to best attract and retain employees, using non-qualified deferred compensation in executive compensation, ESOPs and meeting the challenge of the Affordable Care Act, including managing exposure to the shared responsibility tax.

Matt McCuen

MATT MCCUEN, SENIOR EXECUTIVE AND PARTNER WITH GROUP & PENSION ADMINISTRATORS, INC. (GPA), is a 25-year veteran in the self-funded arena. McCuen joined GPA in 2000 and has played an integral role in the creation and rollout of many innovative programs including Cost Plus, a solution to control healthcare costs and the lack of transparency in the industry.

During his tenure, GPA has experienced significant growth as a company and has been recognized in The Wall Street Journal, Forbes Magazine, the New York Times and numerous online publications as a model Third Party Administrator (TPA).

McCuen and his wife, Sonja, are the proud parents of three children: Anna Kate (14), Lily (12) and Jep (10).

C. Woody Waters

C. Woody Waters, III with ELAP Services LLC

In November, 2002 Woody co-founded ELAP Services LLC, which acts as an outsourced fiduciary to employers that self-fund their health plans. ELAP assists its clients with coverage- and payment-determinations and is the nation's pioneer in metric-based claims reimbursement. ELAP clients typically see $125 PePm in claims savings in year-1, with 0-3% increases in subsequent plan years.

In these days of sky rocketing health insurance costs and the new coverage requirements that PPACA (ObamaCare) imposed, company leaders may need to exercise the same fiscal discipline over their health plan that they apply to all other areas of their business. What steps are you taking to control your plan costs?

Frank Stichter

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- **How to conduct a Benefits Audit**