



NEWS FROM SIIA MEMBERS

2024 MAY 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@siia.org.

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

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



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Craig Julien

CRAIG JULIEN TO LEAD LUMINARE HEALTH

Industry veteran Craig Julien was recently named as chief executive officer for Luminare Health, promoting him from the role of president. Nancy Eckrich stepped down from her role as chief executive officer earlier this month.

Julien brings a broad perspective and deep understanding of the industry, drawing from his over 30 years of industry experience. Prior to joining Luminare Health, Julien served as CEO of HealthSmart, a third-party administrator of self-funded and fully insured health benefit plans. Earlier in his career, Julien held senior leadership positions at TriZetto, Kenexa Technologies, Ceridian, and CNA Insurance Companies.

“With nearly 50 years of experience in the health benefits administration industry, Luminare Health possesses the experience, solutions, and results that clients seek in a third-party administrator. Our unwavering commitment to exceptional customer experience, innovation, and growth will propel our business forward,” says Julien. “Our objective is to deliver service excellence to every client and member we serve.”

Luminare Health is a subsidiary of Health Care Service Corporation, which serves the healthcare needs of nearly 23 million people nationwide.

“Craig has a deep commitment and proven track record in delivering innovative health benefit solutions that improve cost and quality of healthcare while meeting the tailored needs of our customers,” said Arun Prasad, HCSC’s Senior Vice President, Chief Strategy Officer & President, Diversified Businesses. “HCSC is thrilled to have Craig leading Luminare Health as it continues to expand the value that it delivers to the healthcare marketplace.”

“Our extensive experience, coupled with our ability to provide unique solutions and deliver tangible fact-based results, sets us apart in this industry,” says Julien. “We are merely scratching the surface of our potential and the remarkable milestones that lie ahead.”

MICHAEL SCALLIN JOINS BRMS AS VICE PRESIDENT OF MID-MARKET SALES

BRMS, an independent Third-Party Administrator (TPA) with over 30 years of sustained growth and innovation, is pleased to announce the appointment of Michael Scallin as Vice President of Mid-Market Sales. With nearly 15 years of experience in the insurance industry, including a decade in executive management, Michael brings a wealth of knowledge and



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Michael Scallin
Vice President of
Mid-Market Sales
BRMS

strategic insight to this new role.

“We are thrilled to welcome Michael to the BRMS team,” said Luke Schafer, Executive Vice President at BRMS. “His extensive experience and proven track record make him an invaluable asset as we continue to innovate and expand our services in the self-funded industry.”

Michael’s qualifications include years of experience hiring, cultivating, and motivating key employees to build effective sales forces. His deep understanding of the captive marketplace and self-funded health plans, combined with his strategic mindset, make Michael an instrumental piece in implementing and executing effective strategies within BRMS.

KISMET RISK MANAGEMENT NAMES COLIN JEX AS STOP-LOSS SALES DIRECTOR

Kismet Risk Management Associates welcomes Colin Jex to the KRMA family as its new Stop-Loss Sales Director.





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Profit Potential: Members can further bend the trend on total costs with the ability to earn dividends for better-than-projected loss performance.

Captive Resources currently advises 45 casualty and medical stop loss captives comprised of over 6,250 member-companies and more than \$4 billion in annual premium.



Learn More

224-864-8892



Colin Jex
 Stop-Loss Sales Director
 Kismet Risk Management
 Associates

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.

Most recently, prior to joining KRMA, he continued to expand his TPA experience with RBP self-funded business sales with 6 Degrees as VP of Business Development focused on TPA markets.

“We are confident that his passion for our industry, coupled with his extensive experience and unique background, will make him a valuable asset to the KRMA team.” says Manjusha Sheobaran, President of KRMA. “With Colin contributing to our stop-loss sales division, we are positioned to explore new opportunities and deliver enhanced solutions to our clients.”

SELF-INSURANCE INDUSTRY LEADER TOM BELDING ANNOUNCES RETIREMENT

After 47 years of dedicated service in the Insurance and Stop-Loss Industry, Tom Belding, President of PREMS, Inc., is setting his sights on a well-deserved retirement and spending more time with his wife Keli, his family, as well as playing as much golf as possible.

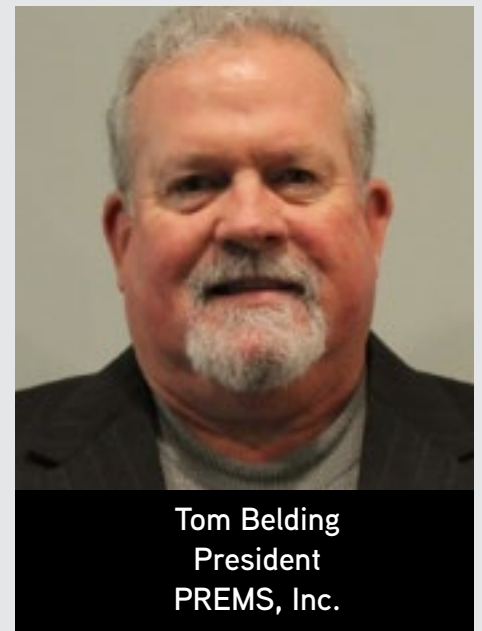
Tom began his career in the insurance industry in December of 1976. He has made many lifelong friends while working in nearly every facet of the industry. He found the most career fulfillment when he started PREMS, Inc. in 1998 with his son, Tommy Belding. PREMS, Inc. became officially incorporated in 1999. Tom was always looking for

ways to save his clients' money. He worked diligently with cost containment vendors because he believed in the savings they provided for his clients while also protecting the carrier by lowering the total claims amounts. He truly is an inspiration to everyone within the industry.

Tom previously served on the SIIA board of directors and was also a trustee of the Self-Insurance Political Action Committee (SIPAC).

JULI WILLIAMS NAMED VICE PRESIDENT OF STOP-LOSS CENTER OF EXCELLENCE AT CLEARPOINT HEALTH

Juli Williams has joined ClearPoint Health as part of their executive leadership team, serving as the vice president of their Stop-Loss Center of Excellence.



Tom Belding
 President
 PREMS, Inc.



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Juli Williams
Vice President of Stop-Loss
Center of Excellence
ClearPoint Health

“I am incredibly excited to collaborate with the talented team at ClearPoint Health and embark on this new adventure.

My focus will be on making meaningful contributions to ClearPoint Health strategic growth goals and the expansion of self-funding opportunities in the market,” said Williams.

Williams was previously director, commercial market product strategy at Aetna, a CVS Health Company, from July 2019 to February 2024 in Jacksonville, Florida. Prior to that, she was senior program manager – stop-loss and reinsurance at Florida Blue from February 2007 to July 2019, where she provided leadership in developing, launching and operating a profitable stop-loss and reinsurance administration leveraging a partnership model.

MARTY JOSEPH JOINS THE OCCUNET COMPANY

The OccuNet Company proudly welcomes Marty Joseph, a pioneering figure in the healthcare industry, as its new Executive Vice President of Strategic Partnerships.



Markel is a global specialty insurance provider, with a truly people-first approach.

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Marty brings nearly four decades of industry expertise to The OccuNet Company. Renowned for his innovative work in third-party administration, cost-containment, and reference-based pricing, Marty joined The OccuNet Company from HealthComp, formerly BAS. Marty, the founding member and shareholder of HealthComp, has been with the company since 1985. He has a deep understanding of our industry's intricacies - the strategic relationships he has cultivated over the years make him an ideal leader to continue growing The OccuNet Company's innovative healthcare solutions.

"Marty has been a driving force in our industry for years," said Alex Fairly, Chairman of The OccuNet Company. "In 2013, he embarked on a journey to explore Reference-based Pricing. With visionary foresight and dedication, BAS established a model that has since been emulated by TPAs across the country. HealthComp's RBP Center of Excellence stands as a testament to his commitment to providing amazing experiences for members while reducing costs, which is where our goals truly align. Marty's expertise and vision in RBP and cost-containment resonate deeply with our company's mission. Now that we are officially together, our strong synergy will drive significant



Marty Joseph
Executive Vice President of
Strategic Partnerships
The OccuNet Company

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impact and innovation in the industry for years to come.”

THE PHIA GROUP RECOGNIZED FOR WORKPLACE EXCELLENCE

The Phia Group has been honored with the 2024 Top Workplaces USA award. This prestigious recognition, presented by Energage, underscores The Phia Group’s commitment to fostering an exceptional workplace environment for its employees by providing such outstanding benefits as ongoing education, philanthropic events, and zero-cost health coverage for employees that have been with

the company for five or more years.

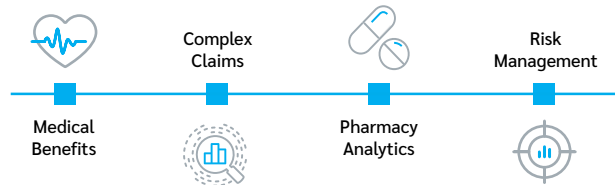
The Top Workplaces USA award, established by Energage, celebrates organizations across the United States that prioritize employee satisfaction and cultivate a positive workplace culture. Winners are chosen based on feedback gathered from employee engagement surveys, with thousands of organizations competing for this esteemed honor.

Phia’s CEO, Adam V. Russo, emphasized the company’s dedication to its employees, stating, “Our mission at The Phia Group is centered around reducing medical costs and improving the quality of healthcare. We understand that our people are integral to achieving this mission, which is why we prioritize their satisfaction and well-being. This award reaffirms that our efforts to create a supportive and empowering workplace have not gone unnoticed.”



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Alan Sherman

GRADIENT AI ANNOUNCES ALAN SHERMAN AS VICE PRESIDENT OF MARKETING

Boston, MA April 2, 2024 - Gradient AI, a leading enterprise software provider of artificial intelligence (AI) solutions in the insurance industry, today announced the appointment of Alan Sherman as vice president of marketing. With leadership and marketing roles spanning more than 25

years, Sherman brings a wealth of experience to his new position.

Prior to joining Gradient AI, Sherman served in senior marketing and general management roles, including five years as vice president of marketing at Hebrew College, where he led strategic marketing initiatives that significantly enhanced enrollment and philanthropy, driving notable market share and revenue growth. He was previously vice president of marketing at IntelliVid, a provider of intelligent video analytics solutions for the retail industry, where he played a key role in driving the company's marketing strategy and expanding its market presence prior to its acquisition by Tyco International.

Additionally, Sherman served in senior marketing roles at several high growth companies including OATSystems, acquired by Checkpoint Systems during his tenure, where he helped grow the startup business to over \$40MM in revenue in five years. His experience spans multiple technology-based solutions including electronic displays, speech recognition, disparate data integration, video analytics, and RFID-based asset tracking.

"Alan's extensive background in marketing leadership and proven track record of driving growth and innovation make him a valuable addition to our executive team," said Stan Smith, CEO and founder, Gradient AI. "His strategic vision and expertise help support our mission of empowering insurers in the Group Health, P&C, and workers' compensation markets to leverage AI to more effectively and efficiently support and grow their businesses."

In his role as VP of marketing, Alan will lead Gradient AI's marketing strategy, with a focus on increasing brand visibility, generating demand, and accelerating the buyer's journey, in support of the company's mission to empower insurers through AI-driven solutions. His appointment reinforces Gradient AI's commitment to helping insurers improve their loss ratios and profitability by accurately predicting underwriting and claim risks and streamlining processes such as quote turnaround times and claims management through intelligent automation.

"As AI has moved into the mainstream in so many industries and applications, insurers are similarly realizing the significant opportunities to leverage the many benefits of AI to enhance their underwriting and claims operations," Sherman said.

"Gradient AI is at the forefront in providing innovative AI solutions for the insurance industry and I'm looking forward to contributing to the company's continued growth and long-term success."

ABOUT GRADIENT AI

Gradient AI is a leading provider of proven artificial intelligence (AI) solutions for the insurance industry. Its solutions improve loss ratios and profitability by predicting underwriting and claim risks with greater accuracy, as well as reducing quote turnaround times and claim expenses through intelligent automation. Unlike other solutions that use a limited claims and underwriting dataset, Gradient AI's software-as-a-service (SaaS) platform leverages a vast industry data lake comprising tens of millions of policies and claims. It also incorporates numerous other features including economic, health, geographic, and demographic information. Customers include some of the most recognized insurance carriers, MGAs, MGUs, TPAs, risk pools, PEOs, and large self-insured employers across all major lines of insurance. By using Gradient AI's solutions, insurers of all types achieve a better return on risk. To learn more about Gradient AI, please visit: www.gradientai.com. ■



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MAY 2024

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