

NEWS

FROM SIIA MEMBERS



2021 JULY MEMBER NEWS

SIIA Diamond, Gold & Silver 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 and jivy@siaa.org.

DIAMOND MEMBERS

BERKLEY ACCIDENT AND HEALTH APPOINTS MATT KOTTMEIER AS REGIONAL SALES MANAGER

Hamilton Square, New Jersey – Berkley Accident and Health, a Berkley Company, has appointed Matt Kottmeier as Regional Sales Manager for its EmCap Group Captive segment. Matt will be responsible for adding to our growth initiatives and developing group captive program business in Texas in this new role.

“We’re very excited to leverage Matt’s experience and deep network of broker relationships that he’s developed over his career in the Texas market,” said Brad Nieland, President and CEO of Berkley Accident and Health. “His employee benefits sales experience will be a great asset to our team.”

Matt joins Berkley Accident and Health with over 20 years of sales experience, primarily in the insurance industry. He has worked on both the carrier and TPA side of the business and most recently served as VP of Sales of a nationally recognized TPA. Matt is a graduate of Texas Tech University and resides in Dallas, Texas.

**About Berkley Accident and Health**

Berkley Accident and Health is a member company of W. R. Berkley Corporation, a Fortune 500® company. Berkley Accident and Health provides an innovative portfolio of accident and health insurance products. It offers four categories of products: Employer Stop Loss, Group Captives, Managed Care (including HMO Reinsurance and Provider Excess), and Specialty Accident. The company underwrites Stop Loss coverage through Berkley Life and Health Insurance Company, rated A+ (Superior) by A.M. Best. Visit BerkleyAH.com.

VÄLENZ® PROMOTES NATHAN NELSON TO SENIOR VICE PRESIDENT, GROWTH

PHOENIX, AZ – Leaders at Välenz® have announced that Nathan Nelson, MBA, has been promoted to Senior Vice President, Growth. Nelson joined the firm as Vice President, Business Development in April 2019. In his new role, he will oversee the sales organization and lead the company forward for strong business growth across all areas of revenue.

“Since joining the team two years ago, Nathan has been a catalyst for ensuring our vision and organizational

strategies are delivered to the market, and for enabling brand awareness consistently,” said Rob Gelb, Chief Executive Officer. “He is the consummate team player and works to collaborate with every member of sales, client services and leadership.”

Nathan’s career spans two decades of proven success in sales and account management for the healthcare industry, primarily in the managed care segment.

Prior to joining Valenz, highlights from his extensive career include sales and leadership in claim management, workers’ compensation, underwriting and account management. Nathan graduated magna cum laude with his master’s in business administration from Webster University in St. Louis, Mo.

“I am honored and excited to take this next step as a Senior VP at Valenz for many reasons, not the least of which is the extraordinary innovation Valenz delivers for

the self-insured industry, as well as the providers and partners who support them,” Nelson said. “As we continue to grow our ever-expanding ecosystem – which is fueled by data and optimized by data transparency unlike anything other firms can provide – the growth opportunities for our team are limitless, as are the savings improvement opportunities for our clients.”

Nelson’s promotion is effective immediately. For more information about Valenz and its leadership team, visit valenzhealth.com.

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* MyHealthGuide. (2019, March). Stop-loss Premium Ranking. MyHealthGuide Newsletter. Retrieved from myhealthguide.com.

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About Valenz

Valenz enables self-insured employers to make better decisions that control costs across the life of a claim while empowering their members to lead strong, vigorous and healthy lives. Valenz offers transparency through data to pinpoint members at highest risk, address gaps in network designs, ensure appropriate and accurate charges, and expertly navigate employees to optimal care solutions for substantial cost savings and improved health outcomes. Visit valenzhealth.com. Valenz is backed by Great Point Partners.

GOLD MEMBERS

LUCENT HEALTH ACQUIRES HEALTH COST SOLUTIONS

Nashville, TN -- Lucent Health, a leading provider of health benefits solutions to self-insured employers, has acquired Hendersonville, Tennessee-based Health Cost Solutions (HCS), a third-party administrator serving the self-insured employer market for 32 years. The acquisition of HCS represents the sixth acquisition by Lucent Health since 2014.

"HCS, like Lucent Health, is focused on bringing a consultative approach to helping employers take care of their people and drive down costs," said Brett Rodewald, Lucent Health CEO. "For HCS customers, Lucent Health will be able to deliver industry-leading customer service and the highest levels of compassionate care

management, which is integrated into our solution. Lucent Health brings HCS customers the scale that drives better savings. We also bring robust monthly reporting to employers and deliver a member experience powered by daily claims data to ensure that individuals feel supported and known."

"We are thrilled to join the Lucent Health family," said William C. Beeler, HCS

President. "This transition allows HCS to continue to grow and provide our current employees

the opportunity to grow as well. Our clients will benefit from the additional services available to them from Lucent Health."

As part of this transaction, HCS clients will have access to Lucent Health's best-in-class care management and concierge care solutions, provided by Narus Health, a Lucent Health company. The Narus Health solutions, integrated into health benefits solutions from Lucent Health, include:

- Precertification/Utilization Review/Utilization Management
- Concierge Care Support
- Traditional Large Case Management
- Complex Care Support

"The key to better health benefits is integrated care management," Rodewald said. "Human-focused, data-driven health care delivers an unparalleled, compassionate customer-centered experience for members. And better, more compassionate care is at the heart of how you help mitigate costs for employers because you are identifying issues at the birth of the claim and working with patients to ensure they are following physician directives and remaining compliant with care plans."

About Lucent Health

Lucent Health, founded in 2014, is the leading health benefits solution provider to the self-insured employer market, with plan administration, patient care and cost controls all under one roof. Visit www.lucenthealth.com.

AMPS EXPANDS SELF-FUNDED MARKET TEAM WITH REY BALCAZAR, SVP OF SELF-FUNDED AND CLIENT SERVICES

Atlanta, GA -- Advanced Medical Pricing Solutions (AMPS), a pioneer in healthcare cost containment, announced its expansion of the self-funded market sales team to meet the growing needs of its clients across the U.S. This growth plan includes expanding to eight regions across the country and doubling its large employer team.

Leading this effort is Reynaldo Balcazar, senior vice president of self-funded markets and client services, who recently joined AMPS. Balcazar is responsible for managing and leading a team of regional sales executives, overseeing the client services team, and managing the sales support unit. He is tasked with growing customer accounts and partner relationships to drive top-line revenue.

"Rey is an outstanding addition to the AMPS team, as he brings experience and sales management skills that will strengthen our team and empower our business development executives to excel," said Lawrence Thompson, chief strategy and revenue officer of AMPS. "He has a deep understanding of the self-

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funded market and knows how to build and enhance a sales force, which will be critical to growing this business segment.”

Balcazar brings more than 30 years of sales and leadership experience in the overall employee benefits industry with companies of various sizes. Most recently he was the health and benefits practice leader at Mercer where he was responsible for revenue growth and profitability via new client sales and existing client expansion. Balcazar has also held sales positions at Principal Financial Group, International Medical Group, and Encore Health Network.

“Healthcare cost management is a top priority with employers as healthcare costs continue to rise each year,” said Kirk Fallbacher, AMPS president and CEO. “By expanding our sales efforts and adding industry veterans to our team, AMPS is able to enhance its ability to serve the self-funded market and provide innovative healthcare cost containment solutions. We have the right solutions, a team of experts in place, and the flexibility to provide excellent customer service.”



AMPS EXPANDS SALES TEAM TO DELIVER HEALTHCARE COST CONTAINMENT SOLUTIONS TO SELF-FUNDED MARKETS NATIONWIDE

ATLANTA – Advanced Medical Pricing Solutions (AMPS), a pioneer in healthcare cost containment, announced the continued expansion of its self-funded market sales division.

AMPS’ four new sales professionals – Mike Causey, Kevin Conway, Anthony Masotto, and John Phillips – will accelerate the AMPS mission to make healthcare dollars go further.

They will deliver multi-faceted solutions that help self-funded employers reduce medical and pharmacy costs and provide high-quality patient care for their employees.

According to Lawrence Thompson, chief strategy and revenue officer of AMPS, the sales expansion is happening at the right time, especially as employers continue to take on more financial risk providing healthcare benefits to their employees. “Mike, Kevin, Anthony, and John understand there is no one-size-fits-all plan for employers,” he says. “I am confident in their ability to deliver flexible plan options that meet the unique needs of self-funded employers and their employees.”

Mike Causey will serve as vice president of business development in Arizona, Colorado, Montana, New Mexico, Nevada, Utah, and Wyoming. He brings more than three decades of employee benefits and experience to AMPS, previously with

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Kevin Conway will serve as vice president of business development across the Mid-Atlantic region and brings more than three decades of group insurance experience to AMPS. Prior to AMPS, he worked with Upstate Insurance Brokerage Services, HM Insurance Group and Upstate Administrative Services.

Anthony Masotto will serve as vice president of business development for pharmacy benefits management, bringing 13 years of group pharmacy and stop loss insurance experience to AMPS, and holding previous positions with Assurant Employee Benefits, Sunlife Financial, Avesis, Remedy Analytics, and ELMCRx.

John Phillips, MBA will serve as vice president of business development for the Northeast region of the U.S. He brings more than 25 years of insurance sales experience to AMPS, having previously worked with Versant Health, Wells Fargo Insurance and Corporate Synergies.

AMPS President and CEO, Kirk Fallbacher notes the self-funded community still struggles to manage rising healthcare expenditure. "We strive to provide cost effective solutions knowing that greater financial transparency and flexibility is still needed in the market." He adds, "By appointing four new sales professionals, we are able to expand our footprint even wider, reducing medical and pharmacy costs for more employers, while keeping their employees satisfied with quality healthcare benefits."

About Advanced Medical Pricing Solutions (AMPS)

Advanced Medical Pricing Solutions (AMPS) provides market leading healthcare cost containment solutions serving self-funded employers, brokers, TPAs, health systems, health plans, and reinsurers. AMPS mission is to help clients attain their goals of reducing medical and pharmacy costs while keeping members satisfied with quality healthcare benefits. AMPS leverages its 15+ years of experience and data in auditing and pricing medical claims to deliver "fair for all" pricing. AMPS offers detailed analytics and transparency to provide clients with insights based on plan performance. Contact Tara Rowland, Sr. Communications Manager/Technical Writer, at trowland@advancedpricing.com and visit www.amps.com.

team to accelerate company expansion.

Bethesda, MD – WellNet Healthcare - the national healthcare management firm building and optimizing smarter self-funded health plans for companies and their people - announces four strategic hires to help accelerate key growth initiatives for the organization.

Megan Chiarello, Vice President of Marketing – Megan joins the team with over a decade of experience in the employer healthcare and benefits technology space. With a deep passion for B2B marketing and strengthening broker relationships, Megan's previous leadership role at benefitsCONNECT supported a \$23m company acquisition in 2016.

Roger Vandenboogaard, Vice President of Client Service – Roger has led operational teams across multiple industries to exceed retention goals and increase profitability. As a leader in the benefits client experience, Roger managed marquis, Enterprise relationships for Maestro Health during its \$155m acquisition by AXA group.

Jack Graham, Vice President of Business Development, Midwest – Jack joins WellNet with nearly three decades of sales level and self-funding benefits experience. Well-versed in group health, life, stop-loss coverage and PPOs for companies up to 30,000 employees, Jack led mid-west sales efforts at CoreSource and KEY Benefit Administrators to drive new business, build client rapport and create strategic partnerships in the industry.

Roy Pasquarette, Vice President of Business Development, Midwest – Roy delivers high-performing sales experience to WellNet as the number one national business development executive at EyeMed, the nation's fastest growing vision benefits company in the U.S. Prior to EyeMed, Roy spent a decade partnering with brokers and advisors at United Healthcare implementing strategic solutions in the employee benefit space.

SILVER MEMBERS

WELLNET HEALTHCARE RECRUITS TOP INDUSTRY TALENT DURING MAJOR GROWTH MODE

On the heels of a successful WellNet+ launch and robust quarter, four new benefits executives join the WellNet leadership



“WellNet is on the bleeding-edge. We’re experiencing rapid growth within the organization – from product optimization to account management expansion - and investing in the talent to carry out our strategic vision,” said Keith Lemer, CEO of WellNet Healthcare.

“Our team is constantly working to exceed the evolving needs of our employer groups, their members and advisers. It’s imperative we find executive leadership with the expertise, passion and drive to carry out this mission. Too often, there is a focus only on the structural cost-savings that self-funding provides, but it’s so much more than that.”

The expansion of the leadership team is on the heels of a robust quarter at WellNet, the addition of Chief Revenue Officer, Dave Earle in June 2020 and the release of WellNet+ - a turbo-charged, self-funded solution with 20+ performance optimizers for precision accuracy.

Leveraging aligned incentives, a proprietary toolkit analysis Blade, triple-aim advocacy and turn-key packages, businesses are saving 10% to 40% on healthcare costs – at their own pace - to reinvest back into their workforce.

To launch WellNet+, hundreds of advisers and industry experts joined a virtual Watch Party where attendees engaged with a high-energy trailer, previewed success stories of million-dollar cost-savings outcomes and participated in a live Q&A with product experts.

About WellNet Healthcare

WellNet builds and optimizes smarter self-funded health plans for companies across the nation with 100 to 5,000 employees. Taking risk and leveraging our patented technology stack, we fix the unaffordable healthcare mess with ongoing education, stronger advocacy, and aligned incentives to combat the vested interests of traditional health insurance carriers. Our unique ability is doing whatever it takes – at the right pace – with our Crawl, Walk, Run approach to lower the cost of healthcare and improve the experience for companies and their people. Contact Megan Chiarello, Vice President of Marketing, WellNet Healthcare, at mchiarello@wellnet.com and visit www.wellnet.com.

6 DEGREES HEALTH WELCOMES BONITA HATCHETT-BODLE AS GENERAL COUNSEL

Hillsboro, OR -- 6 Degrees Health is pleased to announce that Bonita Hatchett-Bodle has joined the company as General Counsel.

Bonita has spent her 25+ year career as an ERISA and benefits lawyer in a large law firm setting. She holds a degree from the University of Michigan and attended Rutgers University School of Law and Georgetown University Law School.

Scott Ray, 6 Degrees Health's Chief Executive Officer, states, “Bonita is an accomplished benefits attorney with over 25 years of experience in a variety of settings, from a large international law firm to General Counsel for a leading independent employee benefits organization. The wealth of experience she brings to 6 Degrees Health will drive immense value to our clients and products that operate in a highly regulated and technical landscape.”

Bonita can be reached at BonitaHB@6degreeshealth.com

About 6 Degrees Health

6 Degrees Health is built to bring equity and fairness back into the healthcare reimbursement equation. Industry-leading MediVI technology supports our cost containment solutions with objective, transparent, and defensible data. 6 Degrees Health’s solutions include everything from provider market analyses, reasonable value claim reports, ad hoc claim negotiations, evergreening provider contracts, and referenced-based pricing. Our veteran cost containment team partners with health plans and their channel partners to deliver unparalleled cost containment results. Visit www.6degreeshealth.com. ■



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