



NEWS FROM SIIA MEMBERS

2021 OCTOBER 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 at jivy@siaa.org.



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DIAMOND MEMBERS

HPI NAMES MATT KENNEDY AS NATIONAL VICE PRESIDENT OF SALES

Westborough, MA – As the company's expansion continues to flourish across the country, HPI has tapped Matt Kennedy, self-funding and Reference-Based Pricing (RBP) expert, as their new national vice president of sales. Matt brings over 15 years of experience as a trusted resource in the industry and will hit the ground running as an impactful and purposeful leader on HPI's national sales team.

"I couldn't be more excited to have Matt on board at HPI," said Drew Rozmiarek, senior vice president of national sales and emerging markets. "Matt's the type of person you want in your corner; everything he does is with intention. He's a respected, trusted source in the industry and an RBP expert eager to add knowledge to his repertoire. Matt's never-ending quest to pursue more is exactly what we are always looking for at HPI—someone who will embrace our mission to keep innovating and evolving healthcare. He's a great fit for us, and I can't wait to finally get to work together on the same team."

Matt most recently served as senior vice president of growth at HST, where he was a leading driver of company expansion and client retention and was regarded as the top salesperson for the successful RBP start-up for four years. Previously, he served as a sales consultant for Intuitive Surgical.

"Having worked with HPI as a partner for five years, I have been able to experience first-hand the success this organization has achieved helping employers drive down cost while always putting the member first," said Matt Kennedy. "HPI's ability to offer many solutions that can be customized to meet each client's needs as well as how they continually look at ways to improve healthcare were major reasons why I wanted to join this team. I am thrilled to be with HPI working alongside a group of great people and eager to help future clients and their members."

About HPI

HPI redefines what is possible with self-funded health plans. As a leading national third-party administrator, they partner with health plan brokers and employers to provide innovative self-funding strategies and customized plans tailored to each client's needs and population. HPI's solutions give employers greater cost transparency and control, while elevating the member experience. It is their flexible

approach, entrepreneurial spirit and commitment to quality, technology, and service that enable them to deliver premium value to their customers. Contact Su Doyle, VP of Strategic Marketing, at sdoyle@healthplansinc.com and visit www.hpiTPA.com

VÄLENZ® PROMOTES BRIAN CAMPBELL TO VICE PRESIDENT, CLIENT SERVICES

PHOENIX, AZ – Valenz®, the innovators behind the industry's most transparent, data-driven ecosystem for self-funded employers and their health plan partners, recently announced that Brian Campbell has been promoted to Vice President, Client Services.

Campbell joined the firm in January 2019 as a senior client services executive. In his new role under the leadership of Nathan Nelson, Senior Vice President, Growth, Campbell now oversees the client services team.

"Since joining us nearly three years ago, Brian has exemplified the character, culture and vision of our company – he lives our values and promotes the strong, vigorous, healthy mindset at the core of the Valenz brand," said Rob Gelb, Chief Executive Officer. "His ability to collaborate and lead will serve him, our team, our clients and our company well as we move forward and further our ecosystem vision for all stakeholders of the self-insurance community."

Brian's career spans two decades of proven success in client-focused relationships in the healthcare and financial services industry.



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QBE Accident & Health Market Report 2021

Explore industry trends, insights and product details that can help you better manage the risks of a self-funded healthcare plan.

To learn more and read the full report, visit us at qbe.com/us/ah



Alternative Markets



Crop



Specialty & Commercial

Prior to joining Valenz, his career highlights included leading national accounts in commercial insurance, workers' compensation, reinsurance and more. Brian also has a degree in Marketing/International Business from Kansas State University.

"I am extremely energized to take this next step at Valenz," said Campbell. "My account management approach has always been to put clients first and create genuine partnerships, and it's an honor to do so as part of this extraordinary leadership team. I believe in limitless potential for our clients as we partner with them to engage early and often for smarter, better, faster healthcare."

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. More information is available at valenzhealth.com. Valenz is backed by Great Point Partners.

RENALOGIC EXPANDS LEADERSHIP TEAM FOR CONTINUED GROWTH

PHOENIX, AZ and CHICAGO, IL—Renalogic, the leading company helping employers and health plans fight the human and financial costs of chronic kidney disease, announced today the addition of three new executives.

Scott Vold has joined the team as Chief Commercial Officer, Forrest Barnes III as Vice President of Data and Technology, and Kyle Bersnak as Vice President of Finance.



• • renalogic

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Renalogic simultaneously helps clients reduce risk and manage costs by supporting better health outcomes and providing significant savings related to dialysis care.

Renalogic's predictive analytics identify potential risks associated with CKD while the clinically proven Kidney Dialysis Avoidance Program delivers tailored intervention that slows, stops, and in some cases, reverses the trajectory toward dialysis.

For those on dialysis, the company's proprietary claims repricing methodology provides net savings of up to 85%, which can translate to as much as \$1 million per individual.

“Today we have an opportunity to build on our market-leading position and to help more health plans reduce the human and financial costs associated with chronic kidney disease and dialysis claims,” Kevin Weinstein, Renalogic CEO said. “There’s never been a greater need for organizations to bring innovative solutions to help their employees battle chronic diseases and save on healthcare. Scott, Kyle and Forrest have the leadership experience and skills we need to help more people and plans.”

Scott Vold joins Renalogic as the company's new Chief Commercial Officer. Prior to Renalogic, Vold drove an industry-wide effort to redefine the physician referral management process as Founder and CEO of Fibroblast, Inc., a company he led from concept to successful acquisition by Cerner Corporation in October 2020. Vold began his career as an attorney representing Fortune 1000 companies and financial services firms in complex commercial litigation.

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HOMESTEAD SMART HEALTH PLANS



What are clients saying about our EmCap[®] program?

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- CFO, Commercial Construction Company

“Our clients have grown accustomed to Berkley’s high level of customer service.”

- Broker

“The most significant advancement regarding true cost containment we’ve seen in years.”

- President, Group Captive Member Company

“EmCap has allowed us to take far more control of our health insurance costs than can be done in the fully insured market.”

- President, Group Captive Member Company

“With EmCap, our company has been able to control pricing volatility that we would have faced with traditional Stop Loss.”

- HR Executive, Group Captive Member Company

People are talking about Medical Stop Loss Group Captive solutions from Berkley Accident and Health. Our innovative EmCap[®] program can help employers with self-funded employee health plans to enjoy greater transparency, control, and stability.

Let’s discuss how we can help your clients reach their goals.

This example is illustrative only and not indicative of actual past or future results. Stop Loss is underwritten by Berkley Life and Health Insurance Company, a member company of W. R. Berkley Corporation and rated A+ (Superior) by A.M. Best, and involves the formation of a group captive insurance program that involves other employers and requires other legal entities. Berkley and its affiliates do not provide tax, legal, or regulatory advice concerning EmCap. You should seek appropriate tax, legal, regulatory, or other counsel regarding the EmCap program, including, but not limited to, counsel in the areas of ERISA, multiple employer welfare arrangements (MEWAs), taxation, and captives. EmCap is not available to all employers or in all states.

Stop Loss | Group Captives | Managed Care | Specialty Accident



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Forrest Barnes III joined Renalogic as the company's new Vice President of Data and Technology. Barnes is an Information Technology leader with nearly 20 years' experience in healthcare, Financial Services, and Insurance sectors.

Prior to joining Renalogic, Barnes Served as Director of Information Technologies for Evolution Health, Director of Operations for Blue Cross Blue Shield Insurance and as a Customer Engagement Executive for Guidelt, where he built an enterprise-class background in compliance, security, network architecture, and innovative technology solutions.

Kyle Bersnak was appointed the company's Vice President of Finance, leveraging more than 15 years of executive finance roles, most recently at one of the largest independent third-party administrators (TPAs) in the United States. Kyle's proven history of implementing process improvements and optimizing financial results will benefit all Renalogic clients and partners.

Earlier this summer, Kevin Weinstein was appointed to lead Renalogic as its new Chief Executive Officer. These executive appointments, geared toward better serving clients and growing the company, follow the growth recapitalization with Carrick Capital Partners which was announced in March 2021.

About Renalogic

Renalogic has been the industry leader in dialysis cost containment for nearly 20 years and continues to innovate through the impact of the Kidney

Dialysis Avoidance Program. We are revolutionizing the industry by delivering predictive analytics to identify the progression of the disease, simplifying the costs and clinical complexities of chronic kidney disease to make a positive impact and reduce the dialysis incidence rate in every population we touch. Every chronic condition leading to End Stage Renal Disease is manageable and even preventable when identified early. For more information, please visit <https://renalogic.com/>.

SUN LIFE U.S. MOVES CONNECTICUT OFFICE TO DOWNTOWN HARTFORD

WINDSOR, CT -- Sun Life U.S. announced plans to move its Connecticut office to One Financial Plaza, also known as "The Gold Building," at the corner of Main and Pearl Streets in downtown Hartford.

Sun Life will occupy 47,000 square feet of space in one of the largest, most prominent office towers in Hartford. The building offers modern amenities, including a fitness center, onsite café, and an attached parking garage with state-of-the-art equipment. The location is within walking distance to a number of excellent restaurants, theater venues, museums and other activities.

"Hartford is one of the strongest markets in the world for insurance and related technology professionals, and bringing our Connecticut team to Hartford is an important step in making us an even stronger home for top talent in the area,"

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said Dan Fishbein, M.D., president of Sun Life U.S. "We look forward to developing a strong presence in and relationship with the city of Hartford."

"Our office-work dynamic has shifted to a more flexible model and we intend to design our new space with advanced concepts for the future of work, including features that support how employees choose to work, leading technology, and amenities such as complimentary parking," added Fishbein.

At full capacity, the new office will accommodate up to 450 employees. Currently there are approximately 300 Sun Life employees based in Connecticut, a mixture of underwriting, actuarial, technology, operations, clinical, sales, and product professionals in Sun Life's Stop-Loss & Health and Group Benefits businesses, as well as legal, HR and finance team members.

"This new office will be a hub for Sun Life and give us the opportunity to operate with modern, more efficient capacity for our employees and clients," said Jen Collier, R.N., senior vice president, Stop-Loss & Health, at Sun Life U.S. "Our new, flexibility-inspired space will support our teams' optimal work styles, help us drive better health

outcomes for our members and support our employer clients."

About Sun Life

Sun Life is a leading international financial services organization providing insurance, wealth and asset management solutions to individual and corporate Clients. Sun Life has operations in a number of markets worldwide, including Canada, the United States, the United Kingdom, Ireland, Hong Kong, the Philippines, Japan, Indonesia, India, China, Australia, Singapore, Vietnam, Malaysia and Bermuda. As of June 30, 2021, Sun Life had total assets under management of \$1.36 trillion. Visit www.sunlife.com.



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TRUSTMARK HEALTH BENEFITS PARTNERS WITH GRAND ROUNDS HEALTH TO BRING BEST-IN-CLASS HEALTHCARE NAVIGATION TO ITS CLIENTS AND THEIR MEMBERS

SAN FRANCISCO -- Grand Rounds Health announced that it is partnering with Trustmark Health Benefits to support Trustmark Health Benefits' self-funded clients and their members as they navigate complexities within the healthcare system.

Trustmark Health Benefits, a national employee health benefits administrator, can now offer additional personalized healthcare support to optimize health outcomes, network discounts and services, costs, and member experience

via The Trustmark Navigation and Advocacy service powered by Grand Rounds Health.

"Our collaboration takes the complexity out of healthcare by providing personalized, high-quality, and cost-effective support for Trustmark Health Benefits clients and their members throughout their healthcare journeys in one simple, integrated offering," said Robin Glass, President of Grand Rounds Health and Doctor On Demand.

Without proper guidance, a complex care journey can quickly escalate to unnecessary procedures, high healthcare costs, confusion, and uncertainty for patients. Trustmark Health Benefits can now offer to its clients and their members the ability to leverage Grand Rounds Health's wraparound clinical navigation and advocacy capabilities across a full spectrum of healthcare needs.

Through the Trustmark Navigation and Advocacy service powered by Grand Rounds Health, Trustmark Health Benefits clients and their members can access a complete suite of claims and member services support, along with healthcare navigation offerings all in one place, including treatment decision support, personalized matching to top-quality in-network healthcare providers, expert opinions from world-class experts, cost transparency, and intelligent routing to other benefits in the healthcare ecosystem.

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"We have worked with Grand Rounds Health for years and have experienced exceptional results after adopting their expert medical opinion service as a benefit for our own employees," said Nancy Eckrich, President of Trustmark Health Benefits. "We are excited to expand our relationship by offering the expert medical opinion service, along with Grand Rounds Health's complete healthcare navigation capabilities, to our clients and their members to simplify personal care plans and help improve people's overall health."

After offering Grand Rounds Health's expert medical opinion service for several years, Trustmark experienced a positive return on investment; 75% of its expert medical opinion cases resulted in a change of diagnosis or treatment, typically leading to a more cost-effective, medically appropriate or less-invasive treatment path.

Now, Trustmark Health Benefits will offer that expert medical opinion solution to its clients and their members through The Trustmark Navigation and Advocacy service powered by Grand Rounds Health in addition to the full healthcare navigation offering.

About Grand Rounds Health and Doctor On Demand

Headquartered in San Francisco, the combined company of Grand Rounds Health and Doctor On Demand has been recognized several times in the past year—including *Best Workplaces by Inc. magazine*, *Best Workplaces in Healthcare and Biopharma™ by Great Place to Work and Fortune*, *Best Overall Digital Health Company by MedTech Breakthrough Awards*, and *Best Employer Wellness Company by UCSF Digital Health Awards*. Learn more at www.grandrounds.com and www.doctorondemand.com.

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About Trustmark

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GOLD MEMBERS

HCAA LAUNCHES THE B2B MARKETPLACE

ST. LOUIS, MO The Health Care Administrators Association (HCAA), a leader in education, networking, resources and advocacy for the self-funding industry, launched the HCAA B2B Marketplace, a complimentary online listing of service vendors for the self-funded sector.

The B2B Marketplace is a unique and interactive experience that connects buyers and sellers from across the self-funded sector in branded 'store fronts' offering information on the seller and its products, and services.

"The self-funding industry is built on collaboration, and we are thrilled to offer this important resource beyond HCAA events," said HCAA CEO Carol Berry. "The B2B Marketplace was previously only offered during our Executive Forums and TPA Summits for only our Sponsor Partners, but now we are opening participation to all HCAA Members. Each participant will get their own 'store front' which we will assist them in populating with their information and their products and services. We believe the Marketplace

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will provide an invaluable opportunity for our members to engage not only with one another but also with the public. It will also allow them all another very needed opportunity to showcase themselves, improve their customer interactions, boost referrals, and achieve their business goals."

The marketplace is in its early stages and continues to build in new TPAs and related service vendors to the dozens currently listed there. Those interested in becoming a part of the marketplace and taking advantage of this great member benefit should contact Sara Ayers at sayers@hcaa.org.

Access HCAA's B2B Marketplace at <https://homebase.map-dynamics.com/hcaab2b/marketplace>.

About HCAA

The HCAA is the premier nonprofit trade association elevating third-party administrators (TPAs) and other stakeholders from across the self-funding industry. Throughout our 40-year history, we've remained committed to improving the quality, sustainability, and value of this essential sector on behalf of our members, while forging a path for tomorrow's health care benefit administrators. Visit www.hcaa.org.

SILVER MEMBERS

VERIKAI ANNOUNCES SENIOR LEADERSHIP TRANSITION

SAN FRANCISCO, CA – Verikai announced that co-founder and Chief Executive Officer, Hari Sundram, will transition the role of CEO to current President & Chief Revenue Officer, Jeffrey Chen, who will also be joining the board of directors. As CEO, Jeff will oversee all company operations.

"This shift is something we've planned for a long time, and the time is now," said Hari Sundram.

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“Jeff joined Verikai a long time ago and built out all the company’s major functions we needed to make it successful. It’s one thing to start a company, but a whole different beast to scale it. Jeff has been the architect of our operational strategy, creating the processes we needed then honing them so we could expand at the rate the market demanded.”

“When I started Verikai, the goal was always for me to expand on the thesis that the use of alternative data coupled with machine learning could greatly improve risk prediction. Now that we have proved this thesis true with our market traction, it’s time for Verikai to scale. Having Jeff’s background as a former management consultant along with his insurance software experience makes him the perfect person to lead Verikai into the next phase,” said Sundram. “I couldn’t be more confident in Verikai’s future with Jeff leading the charge.”

Hari is best described as a serial entrepreneur – a visionary and builder who pushes the envelope of ideas; always looking for what he can develop, which will make the biggest impact. This transition has always been part of the plan for Verikai, and with the company’s immense success over the last year, the timing was right for a transition from Hari to Jeff.

“I’m honored to be appointed the CEO of Verikai at such an exciting time in our company history,” said Jeff Chen. “In the last year alone, we have seen tremendous improvement of our risk models as well as the launch of our game-changing Marketplace. Our market momentum is palpable and with so much upside, the opportunities feel endless.”



"I'd like to thank Hari for his guidance and leadership, and for entrusting me with the opportunity to lead the great organization that he built," said Chen. "I have been lucky to work side-by-side and learn from one of the best entrepreneurs I know. Using his unique vision and market knowledge, he has laid out a plan for Verikai to achieve great things for many years to come."

About Jeffrey Chen

Jeffrey Chen has 20+ years of experience as a management consultant and enterprise software leader. Prior to Verikai, he spent six years at Guidewire Software leading their value sales organization. Prior to his move into software, he worked at multiple consulting firms, advising fortune 500 companies for over a decade on customer strategy and operations. Jeff holds a BS from Penn State University, MS from George Washington University, and an MBA from Georgetown University.

About Verikai

Founded in 2018, Verikai is an insurance technology company leveraging alternative data and machine learning to change the way the industry views risk. Our well-established database of more than 1.3 trillion data points includes over 5,000 behavior attributes for 250+ million people in the United States and provides deep insight to these individuals' true health risks. With this data, Verikai generates risk reports in real-time with only a census. This greater insight helps insurance companies increase new business, reduce losses and improve efficiency in the underwriting process – and ultimately, provide consumers and businesses with greater access to a broader range of insurance products. Contact Ellie Newby, Marketing Manager, at ellie.newby@verikai.com and visit verikai.com. ■



Capture the power of the Vālenz® ecosystem

Transparent data engagement and integrated solutions for smarter, better, faster healthcare

Where others provide visibility into data, only Vālenz® delivers the clarity you need to see your path to lower costs, better health outcomes and enhanced member lives. As the industry's **first fully transparent, end-to-end ecosystem**, Valenz integrates a comprehensive suite of solutions with deep and continuous data analysis across the life of every claim. From network design to care delivery, expert bill reviews, claim management, payment integrity and more, our ecosystem enriches your data and decision-making at every step. The result: transparent data engagement and integrated services that pave your way to smarter, better, faster healthcare.

To capture the power of the Valenz ecosystem, visit us at SIIA or call **(866) 762-4455** today.



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SEPTEMBER 2021

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