



NEWS FROM SIA MEMBERS

2023 SEPTEMBER 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.

DIAMOND MEMBERS**AMWINS ANNOUNCES NEW HIRES JOINING STEALTH PARTNER GROUP AND AMWINS GROUP BENEFITS**

CHARLOTTE, NC -- Amwins, a global distributor of specialty insurance products and services, announced three new additions to the firm. Brad Mathews and Todd Marcoux will be joining the sales team at Stealth Partner Group, the largest stop-loss wholesaler in the U.S., and Kathy Phillips will be joining the ancillary practice team for Amwins' Group Benefits division, a leading provider of employee benefits products and services.

Brad Mathews will serve as vice president working in the southeast region and based out of Tampa. After graduating from the University of Georgia with a finance and risk management degree in 2006, Brad moved to Tampa and began his career with Genworth Financial which was acquired by Sun Life Financial in 2007.

Brad considers the highlight of his sales career being inducted into the Sun Life Distribution Hall of Fame in 2017. He has a passion for finance and has held his Certified Financial Planner (CFP) designation for more than 10 years.

Todd Marcoux will serve as vice president working in the

northeast region and based out of Boston. Todd earned his MBA from the University of Massachusetts and began his insurance career in 1993, bringing 30 years of industry experience to Stealth Partner Group. He spent the last 16 years with Tokio Marine HCC as vice president and manager for the northeast and mid-Atlantic territories.

"We are delighted to bring Brad and Todd on board," said Harley Barnes, chief executive officer at Stealth Partner Group. "They have a tremendous level of experience and expertise that will enhance our ability to provide best-in-class support to our clients, carriers and retail broker partners."

Kathy Phillips will serve as senior vice president and Ancillary Benefits national practice leader. With over 30 years of experience, she brings a wealth of knowledge and expertise in life, disability, extended sick bank transformation, supplemental health, dental and leave administration.

Kathy was a top-producing ancillary insurance wholesaler at Lincoln Financial Group, focusing on helping clients find solutions to their benefits challenges. She is a highly sought-after expert in the field, and her unwavering commitment to providing superior service and building strong, lasting relationships was a cornerstone of her 27 year tenure at Lincoln Financial Group.

"With her proven expertise in ancillary benefits, Kathy is a great asset to our growth strategy and ongoing mission to provide industry-leading broker and client support," said Riva Dumeny, chief operating officer at Amwins Group Benefits. "Kathy is an innovative leader, and we are looking forward to sharing the developments she brings to our products, services and carrier relationships."

About Amwins

Amwins is the largest independent wholesale distributor of specialty insurance products in the U.S. dedicated to serving retail insurance agents by providing property and casualty products, specialty group benefit products, and administrative services. Based in Charlotte, N.C., the company operates through more than 155 offices globally and handles premium placements in excess of \$33 billion annually. Visit amwins.com

TOKIO MARINE HCC ANNOUNCES AGREEMENT TO ACQUIRE GULF GUARANTY EMPLOYEE BENEFIT SERVICES, INC.

Tokio Marine HCC announced it has signed a definitive agreement to acquire Gulf Guaranty Employee Benefit Services, Inc., a third-

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party administrator and managing general underwriter that designs, underwrites, and administers group gap medical plans for small and mid-sized businesses. The transaction is expected to close in the third quarter of 2023.

Gulf Guaranty offers a group gap medical plan called MedPlus that pays limited benefits for expenses otherwise covered by an employer's primary medical plan, but not payable due to the deductible and co-insurance provisions of the primary plan.

MedPlus is employer-paid, and every employee enrolled in the employer's primary medical plan is automatically enrolled in the product. Group gap medical coverage is a new, profitable product addition to Tokio Marine HCC. The acquired operation produces gross written premium of approximately \$60 million annually.

Sherman & Company served as financial advisor to Gulf Guaranty Employee Benefit Services, Inc.

About Sherman & Company

Sherman & Company is an investment banking firm dedicated to the convergence of the insurance, healthcare, technology, and asset &

wealth management industries. Visit sherman-company.com

About Tokio Marine HCC

Headquartered in Houston, TX, Tokio Marine HCC is a member of the Tokio Marine Group, a premier global company founded in 1879 with a market capitalization of \$38 billion. Tokio Marine HCC-Stop Loss Group covers over 3,500 self-funded employers and union plans for medical stop loss and another 1,000 groups with organ transplant insurance. Visit tmhcc.com



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SUN LIFE LAUNCHES PROGRAM WITH OPTIMED HEALTH PARTNERS TO MAKE SPECIALTY DRUGS MORE ACCESSIBLE AND AFFORDABLE

WELLESLEY, Mass., -- Sun Life U.S., the largest independent medical stop-loss provider in the country, has named OptiMed Health Partners as a preferred partner to further the company's goal of improving healthcare access, while also managing rising healthcare costs.

The new program through OptiMed will identify opportunities to administer specialty drugs to members who need them - in a convenient setting, such as the member's home or an infusion center - working in concert with the member's physician and care team.

This type of highly coordinated and personalized delivery system reduces the risk of infections and complications for patients while decreasing the treatment costs for high-cost specialty drugs.

The new solution, Medical RX Management powered by OptiMed, is an extension of Sun Life's Clinical 360 program, which combines innovative data analytics with superior clinical expertise to identify cost savings and ways to optimize patient care and outcomes.

At no additional cost to the client, OptiMed's vast experience in effectively managing specialty medication trends will help those

who self-fund their health plans better manage their healthcare costs.

According to KFF, an independent non-profit organization focused on national health issues, 65% of covered workers in the U.S. are in a self-funded plan, where employers pay their own medical claims.

"Expensive specialty drugs are major contributors to escalating healthcare costs which can significantly impact self-funded plans," said Jennifer Collier, president of Health and Risk Solutions, Sun Life U.S. "Through this collaboration with OptiMed, we will tackle two pressing issues in the healthcare ecosystem - access and cost. Medical Rx Management powered by OptiMed will provide more ways for members to receive vital healthcare while reducing unnecessary costs for our clients."

"As therapeutic advancements continue, it is essential for plans to lean on industry experts and partnerships such as this, to promote sustainability and high levels of clinical support to members when they need it most" said Rusti Greis, Vice President, Business Development for OptiMed Health Partners. "Our passion to reimagine healthcare solutions that deliver unsurpassed value, leverages technology and concierge services; creating an exceptional patient experience and driving positive industry change."

OptiMed provides specialty infusion medications and therapy management for many conditions including a large number of medications listed in Sun Life's annual High-cost claims and injectable drug trends analysis of medical stop-loss claims.

OptiMed's program has been reviewed and accredited by two nationally recognized accreditation bodies focused on patient care and safety.

Sun Life manages high-dollar medical claims for more than 2,800 self-funded employers covering more than 9 million people. Utilizing its extensive medical claims database, Sun Life provides expert insights each year on clinical conditions and medical trends that drive high-cost claims as well as how people utilize their healthcare.

Sun Life is the largest independent stop-loss provider in the U.S. according to data from the National Association of Insurance Commissioners. An independent stop-loss provider does not sell medical claim administration services.

About Sun Life

Sun Life is a leading international financial services organization providing asset management, wealth, insurance and health solutions to

A CLEAR PERSPECTIVE STARTS WITH TRANSPARENCY.

The big picture is always in our view – ensuring that you, your business and your members are strong, vigorous and healthy. From our vantage point, that's possible only when you have open, accessible and accurate information – complete visibility across our Healthcare Ecosystem Optimization Platform.

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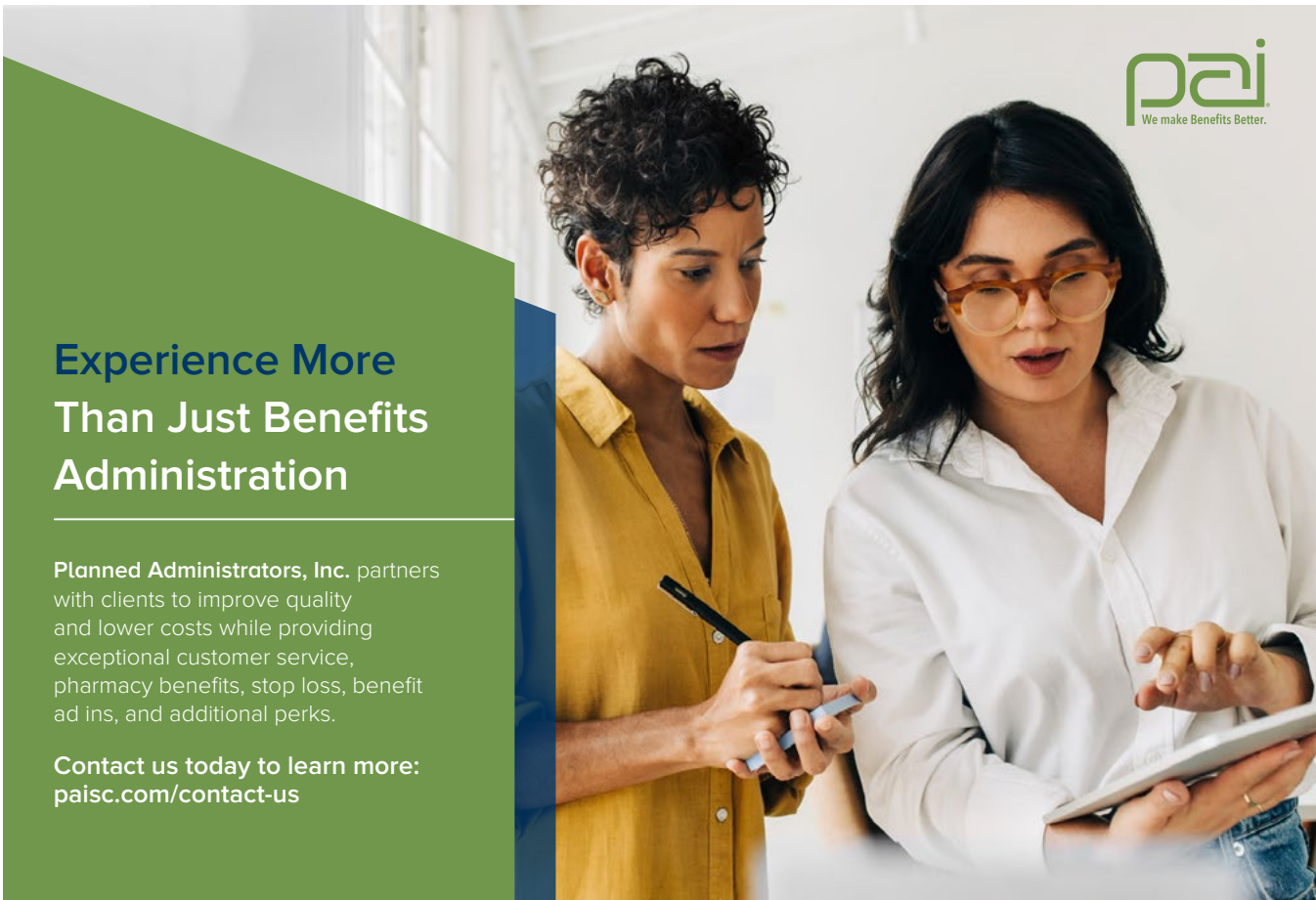
individual and institutional Clients. Sun Life has operations in a number of markets worldwide, including Canada, the United States, the United Kingdom, Ireland, Hong Kong, the Philippines, Japan, Indonesia, India, China, Australia, Singapore, Vietnam, Malaysia and Bermuda. As of March 31, 2023, Sun Life had total assets under management of C\$1.36 trillion. Visit www.sunlife.com

Sun Life Financial Inc. trades on the Toronto (TSX), New York (NYSE) and Philippine (PSE) stock exchanges under the ticker symbol SLF.

Sun Life U.S. is one of the largest providers of employee and government benefits, helping more than 50 million Americans access the healthcare and coverage they need. Through employers, industry partners and government programs, Sun Life offers a portfolio of benefits and services, including dental, vision, disability, absence management, life, supplemental health, medical stop-loss insurance, and healthcare navigation. Sun Life U.S. and affiliated companies in asset management employ approximately 8,000 people in the U.S. Group insurance policies are issued by Sun Life Assurance Company of Canada (Wellesley Hills, Mass.), except in New York, where policies are issued by Sun Life and Health Insurance Company (U.S.) (Lansing, Mich.). For more information visit our website and newsroom.

About OptiMed

OptiMed Health Partners, headquartered in Kalamazoo, Michigan, is an independently owned and operated national healthcare organization, leading the charge in the infusion and specialty space. For more than 30 years, OptiMed has leveraged personalized attention to detail to deliver customized solutions that optimize patient outcomes while partnering with other healthcare organizations to usher in a new standard of excellence. Email info@optimedhp.com and www.optimedhp.com.



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GOLD MEMBERS

ADVANCED MEDICAL PRICING SOLUTIONS APPOINTS MATT BROW AS CHIEF EXECUTIVE OFFICER AND BOARD MEMBER

PHOENIX -- Advanced Medical Pricing Solutions (AMPS), a Cimmaron Healthcare Capital portfolio company focused on supporting self-insured employers and healthcare stakeholders in providing affordable, fair, and transparent medical and prescription benefits, announced the appointment of Matt Brow as Chief Executive Officer and Board Member.

Brow joins AMPS following nearly six years leading pharmacy software and life sciences advisory businesses for Inovalon, a leading provider of cloud-based software solutions empowering data-driven healthcare.

Prior to Inovalon, Brow spent nearly 14 years in leadership roles with US Oncology and McKesson focused on strategy, communications, policy, reimbursement, business development, mergers & acquisitions, and operations.

Brow succeeds Kirk Fallbacher who, over the past seven years serving as COO and then President & CEO of AMPS, led tremendous growth and expansion of the company during that time. Fallbacher will continue his leadership contributions to

AMPS as President of Drex - the prescription benefits management subsidiary of AMPS, as an AMPS Board Member, as a member of the AMPS Leadership Team, and as executive sponsor for key strategic accounts.

"I am grateful for Kirk's continued commitment to leadership at AMPS, and I am humbled by the trust and confidence that the Cimarron Healthcare Capital team and our investors have placed in us to fully maximize AMPS' potential," said Matt Brow, Chief Executive Officer of AMPS.

"I am honored to have the opportunity to join the exceptional team at AMPS and look forward to building strong relationships with both our team members and customers," said Brow. "In a healthcare market desperate for innovative solutions, AMPS is well positioned to accelerate its growth and revolutionize employer-sponsored healthcare by providing affordable and transparent care to the benefit of patients and employers alike."

James Nadauld, AMPS Board Chair stated, "The Board is excited to welcome Matt to the team. We are confident his growth-minded leadership will take AMPS and Drex to the next level of their evolution in the months and years ahead."

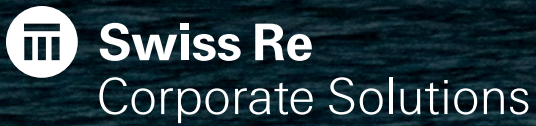
"Matt shares our deep passion for improving healthcare, and I enthusiastically welcome his leadership," said Fallbacher. "To the exceptional teams at AMPS and Drex, I cannot express enough how proud I am of all that we have achieved together over the years. I firmly believe that AMPS and Drex are perfectly positioned for continued success."

About Matt

Matt Brow is Chief Executive Officer of Advanced Medical Pricing Solutions (AMPS). With extensive experience managing cross-functional teams, Matt has engaged internal and external healthcare stakeholders to find consensus and achieve stable business growth.

Prior to joining AMPS, Matt served as President & General Manager of Pharmacy, Life Sciences and Advisory at Inovalon, a leading provider of cloud-based solutions empowering data-driven healthcare.

Matt joined Inovalon in November 2017 to lead its subsidiary Avalere Health and then expanded his role in 2019 to also lead Inovalon's Pharmacy software business which develops, markets, and supports



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the pharmacy operational and workflow software ScriptMed. While at Inovalon, Matt led the successful divestiture of its Avalere Health business.

Before joining Inovalon, Matt was Senior Vice President, Operations, for The US Oncology Network at McKesson Specialty Health, responsible for developing, planning, and directing the operations of The Network across a multi-state territory.

Previously, he held roles at McKesson and its predecessor company, US Oncology, leading public policy, mergers and acquisitions, business development, go-to-market strategy, sales, reimbursement strategy, federal and state government relations, and communications.

Prior to joining US Oncology, he was a consultant, advising clients on state government affairs strategy across a wide range of healthcare and political issues.

Matt holds a BA in History and Political Science from the University of Richmond. He lives in McLean, Virginia with his wife Lauren and their two children.

About Kirk

Kirk Fallbacher brings more than 25 years of experience building teams and solutions serving the healthcare and health insurance industries.

Kirk has successfully grown multiple organizations / divisions from early-stage formation, focused on developing and launching new products, opening new market segments, and pure business growth, to preparation for scaling distribution and resultant enterprise value. He has overseen organic growth, combined with multiple acquisitions to establish flexible platforms with multiple products and services.



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Kirk joined AMPS in 2016 as COO and shortly thereafter assumed the President and CEO role, during which time he grew the employee base nearly 10x; opened offices in Phoenix and Hyderabad, India; established AMPS as a leading vendor in the individual health sharing segment; and completed multiple acquisitions, including Drexel, a pharmacy benefits manager and RX discount card provider.

Prior to AMPS, Kirk served in leadership roles at several technology and consulting firms, including: Netrix Global, ITR Mobility (acquired by Zebra Technologies), NVISIA, Swingtide, Alterian, Platinum Technology, Computer Associates, Novell and Ernst & Young.

Kirk holds a BS, computer science and mathematics degree from Western Illinois University.

About AMPS

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 18+ 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. Visit amps.com

About Cimarron Healthcare Capital

Cimarron Healthcare Capital is a healthcare-focused private equity firm based in Salt Lake City, UT. Cimarron is led by a unique combination of seasoned healthcare investors and operators. The firm partners with owners and operators in the healthcare lower middle-market to build enduring businesses that improve the healthcare system and drive value for all stakeholders.

SILVER MEMBERS

BLACKWELL CAPTIVE SOLUTIONS ANNOUNCES CAPTIVE PLANNING ASSOCIATES AS ITS CAPTIVE INSURANCE MANAGER

Chicago, IL – Blackwell Captive Solutions, an innovative medical stop loss captive domiciled in South Carolina and sponsored by Carrick Capital Partners, announced that it has named Captive Planning Associates, LLC, as its captive manager to further enhance Blackwell's services within the captive insurance and alternative risk markets.

"We are excited about the opportunity to work with Captive Planning Associates ("CPA")," said Kari L. Niblack, President of Blackwell Captive Solutions. "Employer medical stop loss is a financial risk product at its core, and CPA has a demonstrated, successful track record of value creation and truly understands the comprehensive alternative risk ecosystem. This relationship will solidify Blackwell as a leader in the market for years to come."

"We are grateful for the opportunity to develop and manage custom designed medical stop loss programs with Blackwell Captive Solutions," said John Capasso, Chief Executive Officer of CPA. "Our years of experience in the employee benefit market, we believe, will greatly enhance Blackwell's ability to implement unique captive structures for their clients."

About Blackwell

Headquartered in Chicago, Blackwell Captive Solutions is a medical stop loss captive that differentiates by delivering essential stability with desired flexibility via access to cutting-edge health and well-being solutions for our clients. We've proven that combining employers' buying power with tailoring freedom maximizes the impact of self-insurance and reduces market volatility associated with the ultimate cost of healthcare benefit delivery to employees. Visit blackwellcaptive.com

About Captive Planning Associates, LLC

Captive Planning Associates, LLC (CPA) is a boutique captive management firm specializing in providing innovative alternative risk solutions to closely-held family-owned businesses and large corporations to protect management, shareholders, and stakeholders from undue exposure to risk. Our firm is known for its holistic approach to the design, formation, and implementation of captive insurance companies. Visit captiveplanning.com

MARPAI LAUNCHES NEW HEALTH PLAN FOR SMALL SELF-FUNDED EMPLOYERS

Marpai, Inc. announced the launch of its new plan designed exclusively for small employers. The Marpai Vitality Plan is a unique offering in the rapidly growing segment of self-funded health plans, where small businesses are increasingly opting for greater control, cost savings, and better benefits for their employees.

According to the Kaiser Family Foundation Employer Health Benefits Annual Survey, an estimated 20% of workers employed by businesses with under two hundred employees are in self-funded plans as of 2022, versus only 13% of workers in this segment in 2011.

As small businesses recognize the benefits of transitioning from fully insured to self-funded health plans, the Marpai Vitality Plan provides an ideal solution. It combines ease of implementation, speed, and comprehensive coverage to meet the precise needs of small businesses seeking to maximize savings, enhance employee benefits, and provide value-based healthcare options.

Often smaller employers do not have the infrastructure to deal with complex, time-consuming implementations of self-funded health plans. Marpai Vitality Plan has been meticulously designed to simplify the process, ensuring a smooth and hassle-free experience for newly self-funded small employers. From initial setup to ongoing management, the streamlined approach allows organizations to get up and running quickly, enabling them to focus on what they do best - growing their business.

The Marpai Vitality Plan provides comprehensive healthcare for groups of less than 100 employees. It offers a wide range of services, including access to national and regional provider networks, compliance, banking, vision and dental options, telehealth, COBRA administration, out-of-network repricing (OON), utilization management (UM), pharmacy benefit management (PBM), care

management, subrogation, and stop-loss placement. With a strong emphasis on value-based benefits, the Marpai Vitality Plan enables smaller employers to prioritize the well-being and healthcare outcomes of their employees.

“We understand that small businesses are increasingly shifting towards self-funded health plans to take advantage of increased savings,” said Edmundo Gonzalez, CEO of Marpai.

“Our goal is to empower these organizations by providing a plan that is easy to implement, quick to set up, and offers comprehensive coverage for employees and their families.”

With the Marpai Vitality Plan, small businesses gain a competitive edge by offering robust benefits packages that attract and retain top talent, while promoting healthier lifestyles and more effective healthcare utilization. The tailored services cater to their needs, helping them navigate the complexities of benefits management effortlessly.

For more information about the Marpai Vitality Plan for smaller employers, please visit us here: https://info.marpaihealth.com/clevenger_marpai vitality plan

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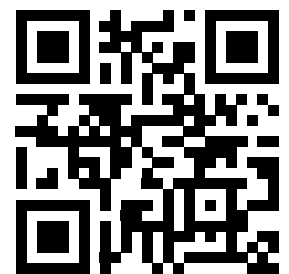
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About Marpai, Inc.

Marpai, Inc. (Nasdaq: MRAI) is a technology company bringing AI-powered health plan services to employers that directly pay for employee health benefits. Primarily competing in the \$22 billion TPA (Third Party Administrator) sector serving self-funded employer health plans representing over \$1 trillion in annual claims, Marpai maximizes the value of the health plan as measured in health outcomes. Marpai takes a member-centric approach that uses AI and big data to connect members to health solutions predicted to have a high probability of positive outcomes and aims to bring value-based

care to the self-insured market. With effective early intervention, disease management, claims processing and proactive member outreach Marpai works to deliver the healthiest member population for the health plan budget. Operating nationwide, Marpai offers access to provider networks including Aetna and Cigna and all TPA services. Visit marpaihealth.com

CLAIMSBRIDGE AND HIGHLIGHT HEALTH ANNOUNCE PARTNERSHIP TO DELIVER UNMATCHED COST CONTAINMENT SOLUTIONS

Philadelphia – ClaimsBridge, a leading healthcare technology company, and Highlight Health, an innovative firm specializing in cost containment strategies, are proud to announce their partnership to provide an unparalleled suite of cost containment solutions for self-funded employers.

The collaboration leverages Highlight Health's unique cost containment methodology and ClaimsBridge's robust Reference Base Pricing (RBP) platform, backed by advanced technology solutions.

At the heart of this partnership is a comprehensive RBP platform that integrates Medicare level pricing, member advocacy, legal



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defense, and audit capabilities. By incorporating hospital financial and regulatory reimbursement policies, powered by the ClaimsBridge Connect technology platform, the joint offering ensures self-funded employers enjoy substantial savings while delivering an exceptional member experience.

“ClaimsBridge’s RBP platform and supporting technology are the gold standard in the industry,” said Josh Spivak, Chief Executive Officer of Highlight Health. “Integrating our product portfolios enables us to collectively offer a best-in-class cost containment solution for self-funded employers.”

Jeffrey Penn, Vice President of Business Development at ClaimsBridge, expressed excitement about the partnership, stating, “We are thrilled to join forces with Highlight Health. Their cost containment program perfectly complements our RBP platform. Together, we deliver an unmatched combination of cost containment expertise and cutting-edge technology solutions for payors.”

About Highlight Health

Highlight Health is an innovative firm dedicated to supporting self-funded health plans in achieving regulatory compliant coverage and implementing effective risk management strategies that substantially reduce healthcare costs. Visit highlight.health

About ClaimsBridge

ClaimsBridge is a leading healthcare technology company offering a range of services in the pre-adjudication claims lifecycle, including Clearinghouse, Reference Based Pricing, Network Access, Custom provider networks, and Network Hosting. As a SaaS-based company, we provide innovative technology solutions that help over 120 administrators and two million covered lives achieve best-in-class cost containment results. Our mission is to streamline healthcare operations and improve the overall healthcare experience for payors, providers, and patients alike.

Contact: Jeffrey Penn, Vice President of Business Development at jpenn@claimsbridge.com and visit claimsbridge.com

RINGMASTER TECHNOLOGIES® APPOINTS CHRIS BERLAND AS CHIEF FINANCIAL OFFICER

Boca Raton, FL -- Ringmaster Technologies®, Inc (RMT) a leading healthcare software provider in the U.S., in continuation of its growth strategy, is pleased to announce the appointment of Chris Berland as Chief Financial Officer and member of the Ringmaster Executive Team.

In his new role, Mr. Berland will utilize his extensive experience and outstanding record as a financial leader in both the technology and healthcare service sectors to guide Ringmaster to the fulfillment of its strategic and financial goals.

Prior to joining Ringmaster, Mr. Berland applied his entrepreneurial approach and financial leadership for companies in the mobile software, pharmaceutical manufacturing, and healthcare IT sectors to help these organizations achieve their growth objectives.

Additionally, as CFO of Datafile Technologies, he played a significant role in the strategic transformation of the company which led to the successful sale of the business.

“Helping early and growth stage businesses realize their potential and achieve their strategic and financial objectives is what gets me up in the morning,” stated Chris. “I am very excited

to be joining the Ringmaster® team comprised of like-minded visionaries whose individual and collective goals are focused on providing value to all of the stakeholders in the self-funded community.”

“Chris is a proven leader who brings an outstanding record in guiding companies to the fulfillment of their vision, mission and strategic goals,” said Todd Roberti, CEO of Ringmaster Technologies, Inc. “I am excited that Chris is now part of the Ringmaster family and I look


forward to utilizing his experience to help us expand our thriving business and deliver on our long-term targets.”

About Ringmaster Technologies, Inc.

Ringmaster is a cloud-based healthcare software provider created to simplify and enhance administrative processes by utilizing cutting edge technologies. Ringmaster offers the first fully automated workflow optimization solution that will drastically reduce processing time and complexity while minimizing the turnaround time for Stop-Loss quoting, contracting, and policy administration. Additionally, Ringmaster offers an end-to-end cloud-based operating system for pharmacy consulting.


Ringmaster Technologies – Realize the Possibilities – Step into the Ring. Contact Leo J. Garneau III, Chief Marketing Officer, at lgarneau@ringmastertech.com and visit ringmastertech.com ■

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SEPTEMBER 2023

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Mike Bentz
President
Optimyl Benefits
Milwaukee, WI

Ashley Johnson
Executive Administrative
Assistant
Semler Scientific Inc.
Santa Clara, CA

Amanda Rieger Green
Founder/CEO
Soul Pathology
Wimberley, TX

SILVER MEMBERS

Harry Tipper, III
Executive Vice President/Chief
Underwriting Officer
Alliance Captive Management,
LLC
Nashville, TN