



## 2023 NOVEMBER 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](mailto:membernews@siia.org).

All submissions are subject to editing for brevity. Information about upgraded memberships can be accessed online at [www.siia.org](http://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](mailto:jivy@siia.org).



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**BELLAGIO - LAS VEGAS**  
**#HCAAEXECFORUM**  
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## DIAMOND MEMBERS

### ELMC'S LEADERSHIP TEAM PURCHASES ELMCRX SOLUTIONS

Wayne, PA — ELMC Rx Solutions, LLC ("ELMCRx") is pleased to announce its independent launch. This follows its purchase by Principal Owner and CEO, Richard Fleder, from its former parent, ELMC Risk Solutions, LLC ("ELMC").

Fleder and Mary Ann Carlisle, ELMCRx's CRO and COO, will continue to lead ELMCRx in its mission to provide quality cost containment and clinical PBM services through a growing portfolio of organically developed programs, acquired companies, and select partnered services.

Fleder is committed to ELMCRx's mission to "maximize the value of pharmacy benefit plans and to expand cost containment and management offerings, with enhanced specialty and non-specialty solutions."

By targeting skyrocketing prices and inefficiency in the specialty drugs market, ELMCRx's model centralizes expert clinicians and technology for the benefit of plan sponsors, carriers, TPAs, brokers, consultants, and members.

"Through our strategic acquisitions and partnerships, we're building a portfolio of service solutions that can be accessed through one entry point.

This will give our broker and TPA partners the ability to implement unique solutions, delivering immediate results to their clients," continued Fleder.

In 2013, Fleder created ELMC through acquisitions and a partnership with investment firm J.C. Flowers & Co. He has been active in insurance and healthcare for more than 40 years and has successfully developed and exited multiple companies.

In 1995, Fleder created broker consulting firm Tesco Benefits, LLC ("Tesco"), one of the top 10 largest specialists in the country, which he merged into the T&H Group in 2006 before its ultimate sale to Blackstone.

Prior to that, Fleder co-founded Comprehensive Benefits (CBSC) in 1978, which he built into the largest third-party administrator in the Northeast. CBSC was then acquired by EBP Healthplans before their combined sale to First Health, a division of First Data Corporation.

Carlisle brings senior experience from a variety of industries to ELMCRx. In addition to her eight years of executive leadership at ELMC, she has more than a dozen years of TPA and brokerage leadership. Since 2018, she has led ELMC's prescription drug companies and managed the acquisition and rebuild of Tesser, a digital health platform. Before joining ELMC, Carlisle was an executive at Tesco Benefits, Fleder's brokerage firm.

#### About ELMCRx Solutions

*ELMCRx Solutions, "ELMCRx", is a PBM services company with a technology-based focus on clinical management and prescription drug cost containment. The company was founded and purchased by Richard Fleder and Mary Ann Carlisle, who together bring many years of industry experience. Visit [www.elmcrx.com](http://www.elmcrx.com).*

### CHRISTINA MORRISON JOINS VALENZ® HEALTH AS NEW CHIEF FINANCIAL OFFICER

PHOENIX, AZ — Valenz® Health announces that Christina Morrison will join the company October 24 as Chief Financial Officer (CFO). Morrison's appointment comes as Larry Eisel, who has served as Valenz CFO since 2019, has shared his plans to retire at the end of the year.

In addition to overseeing the financial operations of Valenz, Morrison will play a key role in strategic planning and establishing company



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goals for sustainable growth. Most recently, she served as CFO with PE GI Solutions, acquired last year by SCA Health.

Previously, Morrison was Senior Vice President of Finance at Aramark, where she led financial planning and analysis, mergers and acquisitions, treasury, and global shared services. She was among the leaders of Aramark's initial public offering in 2013. Prior executive roles also include Senior Vice President of Business and Financial Planning at Merck & Co., Inc., and Senior Vice President/CFO of Wyeth Pharmaceuticals. She began her career in investment banking and became Managing Director at Alex. Brown & Sons, now Deutsche Bank.

"As the top financial executive for a wide range of organizations, Christina brings tremendous business acumen in financial analyses and mergers and acquisitions," said Rob Gelb, Chief Executive Officer of Valenz. "With a successful track record leading three different company-wide transformation projects, she will set a very high bar for achieving the profound organizational change that accompanies rapid growth."

Beyond the traditional roles of controller, treasurer and financial risk manager, Morrison will also be responsible for ensuring agreement and alignment on future mergers and acquisitions.

"I'm thrilled for the opportunity to address the ongoing challenges in health insurance that Valenz has dedicated itself to solving -- changing the way the industry works with self-insured employers, improving simplification across the board, and driving a member-friendly experience that still manages costs," Morrison said. "This is a terrific team that truly has a vision to help its customers and their members thrive."

Based in the Philadelphia area, Morrison has a Bachelor of Science degree in Economics from The Wharton School at the University of Pennsylvania, and she received her MBA from the Tuck School of Business at Dartmouth College. She is also



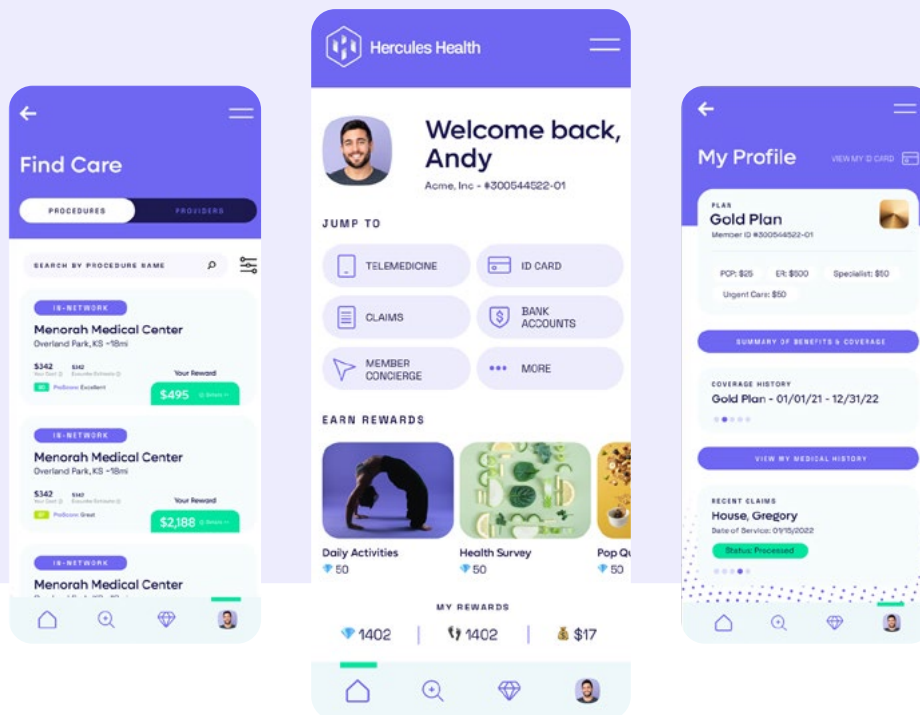




**Hercules Health**  
Technologies

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**Hercules Health**  
Technologies

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a highly involved board member for InVivo Therapeutics, Angel Flight East and numerous other organizations.

### About Vālenz® Health

*Vālenz® Health simplifies the complexity of self-insurance for employers by consolidating health plan solutions on a single platform – the industry-leading Healthcare Ecosystem Optimization Platform. Valenz has deep roots in clinical and member advocacy, alongside decades of expertise in the validation, integrity and accuracy of claims, and a suite of risk affinity solutions. With a steadfast commitment to data transparency and decision enablement, and an omnichannel approach across the healthcare journey, Valenz engages early and often to optimize healthcare for the provider, payer, plan and member, delivering improved cost, quality and outcomes for employers and their members – for smarter, better, faster healthcare. Visit [www.valenzhealth.com](http://www.valenzhealth.com)*

### HM INSURANCE GROUP ANNOUNCES BRENT SHELLY AS ACCOUNT MANAGER FOR TAMPA REGIONAL SALES

Pittsburgh, PA – Brent Shelly has joined HM Insurance Group (HM) in the role of account manager, Tampa Regional Sales. In his new role, Brent will be responsible for managing HM's existing accounts and working with producers to

support the growth of HM's Stop Loss business in Florida.

Brent comes to HM from Bouchard Insurance/Marsh McLennan Agency where he served as an employee health and benefits marketing manager since 2018. With nearly 30 years of experience in insurance, Brent has held team leadership, sales and account management roles at USI, Ameritas, United Concordia and other industry leaders.

He has a Bachelor of Arts degree in Communications from the University of Louisville.

### About HM Insurance Group

*HM Insurance Group (HM) works to protect businesses from the financial risk associated with health care costs. A recognized leader in Employer Stop Loss, the company delivers protection for a range of group sizes. HM also offers Managed Care Reinsurance, including Provider Excess Loss and Health Plan Reinsurance, as well as accident and health specialty reinsurance. Visit [www.hmig.com](http://www.hmig.com) and follow on LinkedIn.*

## SILVER MEMBERS

### INTRODUCING ALLIANCE CAPTIVE MANAGEMENT: PIONEERING MIDDLE MARKET INSURANCE SOLUTIONS

Nashville, TN - Alliance Captive Management, a groundbreaking insurance services firm, is set to revolutionize the insurance landscape with its innovative approach to the formation and management of captive insurance companies. Headquartered in the heart of Tennessee, Alliance Captive Management is set to commence its operations over the Labor Day weekend in 2023.

Captive insurance has long been a strategic financial tool for businesses seeking to manage risk and enhance control over the insurance programs. Alliance Captive Management steps into this domain as a trailblazer, offering expert guidance and services tailored to middle market businesses. With a leadership team that boasts over 50 years of combined experience and insight to its clients.

“We’re thrilled to introduce Alliance Captive Management to the world” said Tim Luby CMO and Co-Founder of Alliance Captive Management. “Our mission is to empower middle market businesses with the financial flexibility and control they need to navigate the complex insurance landscape.”



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### *Key Highlights of Alliance Captive Management:*

- **Expert Leadership:** The leadership team at Alliance Captive Management brings together a wealth of knowledge and experience from diverse sectors within the captive insurance industry. Their strategic insights and deep understanding of market dynamics will be pivotal in delivering effective solutions.
- **Middle Market Focus:** Recognizing the unique challenges faced by middle market businesses, Alliance Captive Management is dedicated to offering tailored solutions that fit the precise requirements of this segment. Their services will encompass every aspect of captive insurance, from formation to ongoing management.
- **Innovation:** Alliance Captive Management is committed to staying at the forefront of industry trends and technological advancements. By leveraging cutting-edge tools and data analytics, they aim to provide clients with insightful and data-driven solutions.
- **Client-Centric Approach:** Collaboration and open communication are at the core of Alliance Captive Management's philosophy. They will work closely with clients to understand their risk profiles, business goals, and unique challenges, ensuring that the strategies implemented are aligned with their long-term vision.

The grand launch of Alliance Captive Management is scheduled for the upcoming Labor Day weekend in 2023. The company is excited to begin its journey towards transforming the way middle market businesses approach their insurance strategies.

*For more information about Alliance Captive Management and its services, please visit [www.AllianceCaptiveMgt.com](http://www.AllianceCaptiveMgt.com) or contact Tim Luby at [T.luby@AllianceCaptiveMgt.com](mailto:T.luby@AllianceCaptiveMgt.com) or direct at 386-527-8200.*

### **NOVA LAUNCHES INNOVATIONS LIFESTYLE BENEFITS**

**BUFFALO, NY –** Achieving a work-life balance can be a challenge. Nova's new





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\*A+ ranking from AM Best received 10/17/02, affirmed 12/1/22, and A+ ranking from Standard & Poor's received 12/22/08, affirmed 4/19/22.

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Innovations Lifestyle Benefits can help employers expand their company culture and promote employees' mental and physical well-being.

Lifestyle benefits, also sometimes called Lifestyle Spending Accounts (LSAs), are provided in addition to a traditional health plan, allowing employees the option to spend funds on eligible products and services to best meet their needs. Employers can choose the products, services, and activities they want to cover.

Adding a benefit to help defray the cost of health and wellness expenses is an investment in employee time outside of work. Outside of greater financial

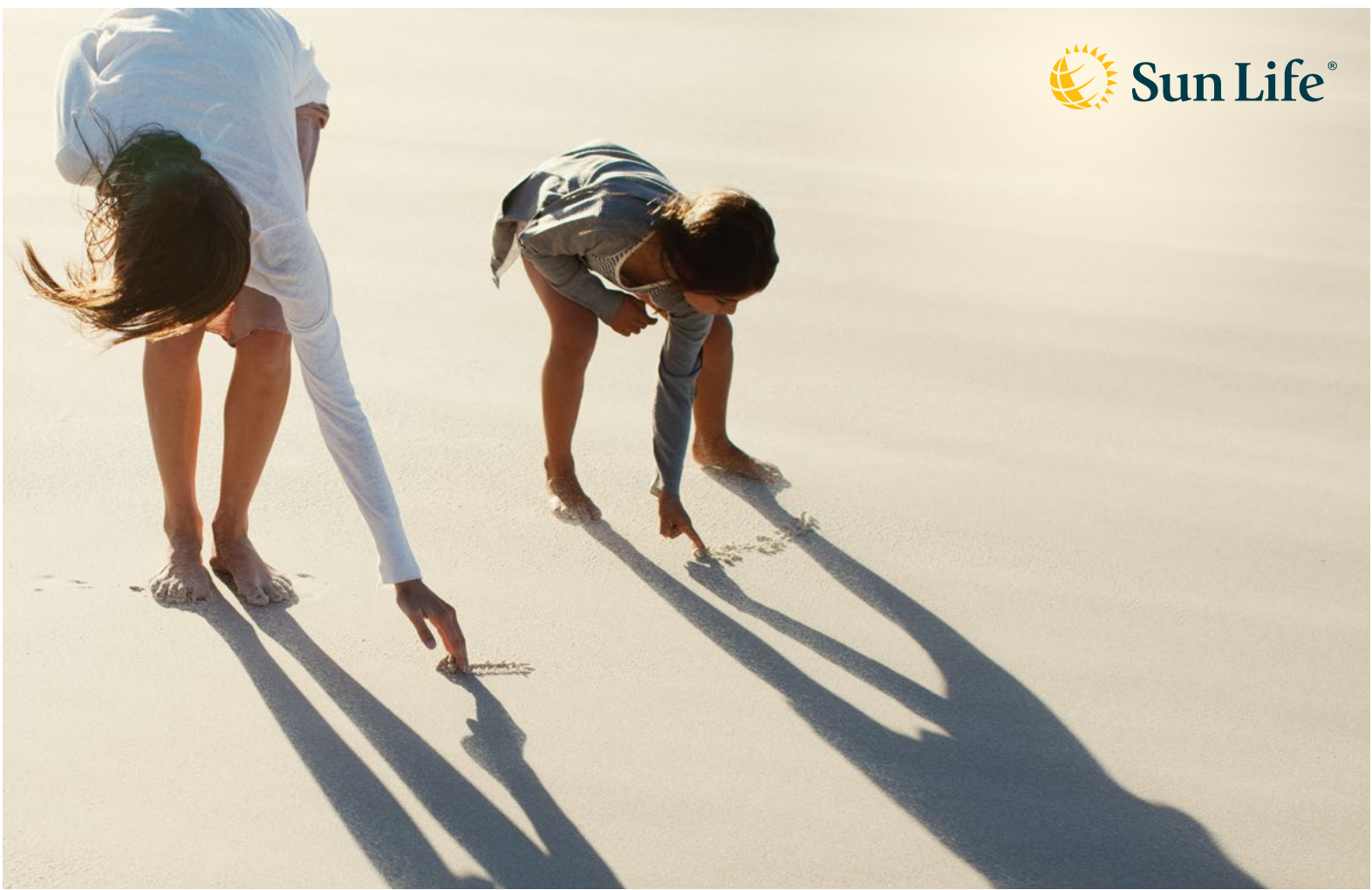
contribution from their employer (42%), employees cite more benefits and resources to help with their financial well-being (33%) and more options and benefits to choose from (33%) as the most valuable improvements to their current benefits package, according to the 2022 EBRI and Greenwald Research Workplace Wellness Survey.

"Lifestyle benefits help employees invest in their physical and mental health," said Jerame DellaPenta, Nova's director of service delivery and engagement. "For employers, it's a new way to engage employees, promote healthy workplaces and support unique employee circumstances. Well-rounded benefits packages can be deciding factors for employees searching for a new role or questioning whether to stay with their current company. These extra perks can have a positive impact on recruitment and retention."

Employers can determine their level of contribution, style of plan build, and which expenses are covered. This includes our "off the shelf" or customized network options. Nova's Lifestyle Benefits network uses predefined merchant categories so employers can choose to customize their plan based on their employees' needs and interests – examples range from gyms and recreation centers to hobby shops or car washes.







## Depend on Sun Life to help you manage risk and help your employees live healthier lives

By supporting people in the moments that matter, we can improve health outcomes and help employers manage costs.

For over 40 years, self-funded employers have trusted Sun Life to help them manage financial risk. But we know that behind every claim is a person facing a health challenge and we are ready to do more to help people navigate complicated healthcare decisions and achieve better health outcomes. Sun Life now offers care navigation and health advocacy services through Health Navigator, to help your employees and their families get the right care at the right time – and help you save money. Let us support you with innovative health and risk solutions for your business. It is time to rethink what you expect from your stop-loss partner.

**Ask your Sun Life Stop-Loss Specialist about what is new at Sun Life.**

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BRAD-6503-y

SLPC 29427 01/22 (exp. 01/24)

Through employer contributions, employees receive a debit card to use toward a variety of recreation, fitness, health and wellness goods and services. Employers determine the unique benefit structure that fits their population. To simplify your plan, an FSA, HRA or HSA can all be offered through one debit card, along with a Lifestyle Benefit.

To learn more about this flexible benefit, visit [www.novahealthcare.com/novainnovations](http://www.novahealthcare.com/novainnovations) or contact [asknova@novahealthcare.com](mailto:asknova@novahealthcare.com).

### About Nova

*Founded in 1982 and headquartered in Buffalo, NY, Nova is one of the largest third-party administrators of self-funded employee benefit programs in the nation, providing the health care solutions our clients need in the way they need them. Nova provides a comprehensive array of services, including medical, dental, vision, COBRA, reimbursement account administration, and private-labeled solutions. Nova also offers award-winning, in-house, integrated medical management programs. We are the stewards of our clients' benefit plans, offering best-in-class partnerships, customized solutions, and personalized service. To learn more, visit [www.novahealthcare.com](http://www.novahealthcare.com).*

### HEALTHEZ EXPANDS SALES TEAM TO CATALYZE GROWTH, SERVICE, AND CAPABILITIES NATIONWIDE

Bloomington, MN -- HealthEZ, a pioneering force in healthcare benefits administration, proudly welcomes four accomplished sales

representatives to fortify its nationwide presence. This strategic recruitment bolsters HealthEZ's commitment to advancing growth, enhancing service, and expanding capabilities across the United States.

The recent appointments underscore HealthEZ's dedication to providing businesses with dynamic alternatives to the costly and underperforming models of major insurance carriers.

Meet the new sales executives:

John Gaudette, Regional Vice President, based in CA

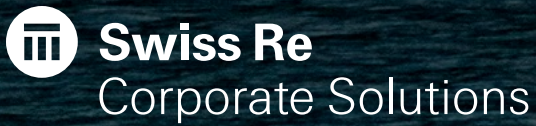
Jamy Parker, Regional Vice President, based in TX

Mike Rotolo, Regional Vice President, based in IL

Jake Gothard, Sales Development Executive, based in IA







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These seasoned professionals bring a wealth of experience and a proven track record in the healthcare benefits industry. Their collective expertise aligns seamlessly with HealthEZ's mission to deliver unparalleled self-funding and level funded solutions.

"As we continue to see increasing demand for innovative benefits solutions, we are delighted to welcome these talented people to the HealthEZ team," said Jim Wachtel, Chief Revenue Officer at HealthEZ. "Their extensive knowledge and dedication to client satisfaction will undoubtedly play a pivotal role in our mission to revolutionize the benefits landscape."

HealthEZ operates coast-to-coast, providing tailored benefits solutions to a diverse array of

clients across various industries. Through innovative partnerships, superior cost containment models and a commitment to service, HealthEZ empowers employers and brokers to take a strategic approach to employee benefits.

"We are committed to offering businesses a superior alternative to the high-cost, low-service models often associated with major insurance carriers," added Jim Wachtel. "This investment in our expanded sales team is poised to drive this vision forward."

### About HealthEZ

*HealthEZ is a trailblazing, independent third-party administrator of self-funded and level funded medical plans, leveraging technology to simplify the complexities of benefits management. With a client-centric approach and a relentless commitment to innovation, service and cost containment, HealthEZ empowers employers and brokers to navigate the evolving landscape of healthcare benefits. Headquartered in Bloomington, MN, HealthEZ operates nationwide. Contact John Blackburn, Chief Marketing Officer, at [John.blackburn@healthez.com](mailto:John.blackburn@healthez.com) and visit [www.healthez.com](http://www.healthez.com). ■*





## We Know ... Risk

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Charlotte, NC

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# SIIA NEW MEMBERS

## NOVEMBER 2023

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Tae Kim  
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Howden Tiger  
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Sumanth Reddy  
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Quantify Holdings  
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Joseph Lovelidge  
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Co-Managing Member  
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Genetic Counselor  
Synergistic Genomics, LLC  
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Carey Gruenbaum  
The Big Plan  
Cedarhurst, NY

Jon-Michael Kerns  
Partner  
Transparent Risk Strategies, LLC  
Dayton, OH

David Balinski  
CEO  
Wire Health  
Glenmoore, PA

Shawn Gillon  
Partner  
Withum  
East Brunswick, NJ

Thomas Boyd  
VP Sales & Marketing  
Zealic Health  
Raleigh, NC

### SILVER MEMBERS

Gerardo Zampaglione  
Founder  
Aegle Health Partners  
Minneapolis, MN

John Sbrocco  
Principal  
Virtue Health  
Henderson, NV

## EVENTS

### **Healthcare Price Transparency Forum**

February 26-27, 2024  
JW Marriott Charlotte  
Charlotte, NC

### **Future Leaders Forum**

April 9-10, 2024  
Kansas City Marriott Downtown  
Kansas City, MO

### **International Conference**

July 22-24, 2024  
Westin Dublin  
Dublin, Ireland

### **Artificial Intelligence Forum**

February 27-28, 2024  
JW Marriott Charlotte  
Charlotte, NC

### **Corporate Growth Forum**

May 6-8, 2024  
Westin Poinsett  
Greenville, SC

### **National Conference**

September 22-24, 2024  
JW Marriott Desert Ridge  
Phoenix, AZ

### **Spring Forum**

March 25-27, 2024  
JW Marriott Hill Country Resort & Spa  
San Antonio, TX

### **Cell & Gene Therapy Stakeholders Forum**

May 29-30, 2024  
JW Marriott Mall of America  
Minneapolis, MN