

SIIA ENDEAVORS



SIIA HAS TWO IN-PERSON EVENTS COMING IN MAY

SIIA CORPORATE GROWTH FORUM

May 15-17, 2023

Westin Poinsett Hotel

Greenville, SC

SIIA's Corporate Growth Forum is designed to help companies active in the self-insurance/captive insurance marketplace better understand growth strategies made possible by corporate financial transactions (mergers, acquisitions, capitalizations, etc.) and engage directly with selected equity groups.

The program will feature content useful to entrepreneurs and strategic planning executives interested in exploring private equity options and developing important relationships to further their business objectives. Valuable to companies ranging from start-ups to established corporate entities, everyone will come away with vital information and insights.

Attendees have the opportunity to present their organization to all Growth Partners as well as schedule private meetings directly with selected equity firms. To review a list of private equity firms that have confirmed their participation visit <https://www.siiaconferences.org/corporategrowth/2023/index.cfm>

Networking and Program highlights include:

LET US INTRODUCE OURSELVES...

Attendees will have the opportunity to introduce their companies to the growth partner sponsors via private, five-minute presentations (one company/attendee at a time presenting to the full group of growth partner sponsors). Advance sign-ups will be required. Given the limited time available, requests will be accommodated on a first come basis.

Note: Only sponsoring companies will have access to these SIIA private member pitches.

WELCOME NETWORKING RECEPTION

SIIA FUTURE LEADERS MEET-UP MIXER

SIIA Future Leaders (under 40) meet-up for an after-dinner networking event. Details to be announced closer to the date.

WELCOME REMARKS & PROGRAM OVERVIEW

SPEAKERS

Mike Ferguson

President & CEO

Self-Insurance Institute of America, Inc.

Orlo "Spike" Dietrich

Operating Partner

The Ansley Capital Group

SPEAKING THE LANGUAGE OF GROWTH

Corporate financial transactions are, even for seasoned business executives, a venture into a new and complicated world. Two specific areas often contribute to most of the confusion.

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First, there are jargons, acronyms, and terminology that are not a part of our normal business conversation, and often have different interpretations, depending upon the sophistication of the user.

Secondly, understanding the optional “sources of capital” and the best fit for your company, requires both a clear understanding of what you are trying to accomplish, and which sources are better suited to help you achieve these goals.

With this in mind, the opening session provides an orientation to these topics, which will get you prepared for the rest of the educational program.

SPEAKERS

Mary Catherine Person

Consultant

Blue General Partners

John Vujovich

Vice President, Corporate Development

Point C

Brian Poger

Operating Partner

Frazier Healthcare Partners

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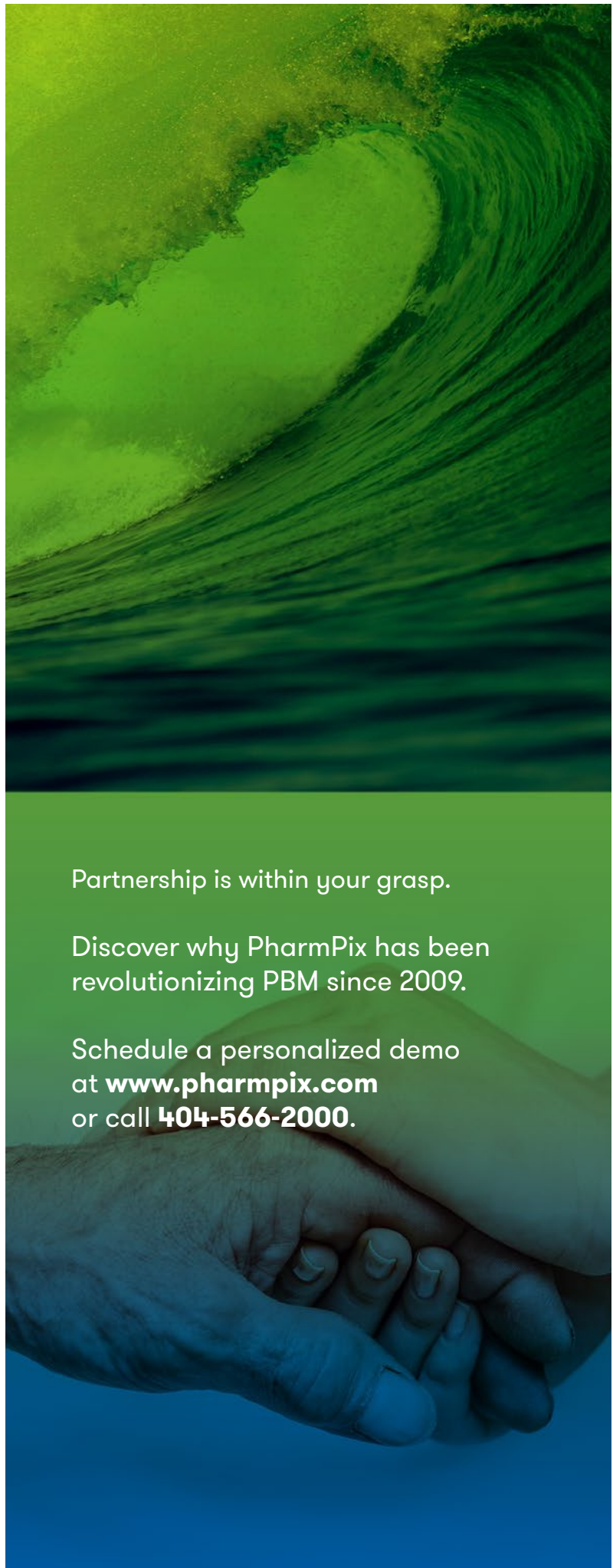
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UNDERSTANDING HOW DEALS ACTUALLY COME TOGETHER

Before you make the decision to consider bringing in outside capital, securing a majority investor, or even selling your company, it is critical that you understand how your initial decisions will drive the ultimate success of this process, and the pitfalls to be avoided.

Many SIIA companies are approached by entities seeking an investment or acquisition opportunity, and understanding the process involved with “running a process” or doing a “targeted” transaction, and the probable outcomes (both financial and strategic) is critical.

Our speaker will walk us through how to understand these processes and how to choose the better one to achieve your goals.

SPEAKER

Sean Fogarty

Partner, Co-Chair of Corporate & Finance Practice

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REAL WORLD FINANCIAL TRANSACTIONS STORIES FROM SIIA MEMBERS

This session will feature a panel of SIIA members who have engaged in various transactions who will provide real-world perspectives on what went right, what went wrong, and what they wish they know prior to their transactions.

MODERATOR

Amanda Eisel- CEO

Zelis

SPEAKERS

Rob Gelb- CEO

Valenz® Health

Ben Frisch- CEO

Point C

Jeff Bakke- CEO

Health EZ

Bill Ashley

Executive Vice President

Allied National

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MEETING TIME

The afternoon has been reserved for attendees to meet with growth partners and/or visit with other attendees. Our large session room will remain open and available for meetings.

WHAT INVESTORS REALLY WANT

Attendees will have the opportunity to hear from a panel of investors active in the self-insurance marketplace on how they evaluate opportunities and approach and negotiate transaction structures.

The panel will also provide advice how to best attract the attention of potential financial partners including venture capital, private equity mezzanine (and other debt structures), and strategic investors.

SPEAKERS

Michael Burcham
Chief of Strategy & Talent Development

Shore Capital Partners

Brett Carlson- CEO
Eir Partners

Richard Fleder
President & CEO
ELMC Risk Solutions, LLC

ALL ABOUT THE MULTIPLES

This session will take a deep dive on multiples (future cash flows), specifically for types of companies involved with self-insurance/ captive insurance.

Related valuation considerations such as earn-outs, stock options and true-ups will also be discussed.

In the final analysis, investors are buying some, or all, of your company's future cash flow. The scale (size), stability and growth of these expected cash flows will drive the value an investor will place on a company. Multiples bring this value into context of where you are today.

SPEAKER

Trey Marinello
Managing Director
Houlihan Lokey

SHARE, ASK & ANSWER

We've reserved the last hour of the program for a moderated group discussion where attendees will be encouraged to share their transaction experiences, ask questions, and invite answers to those questions. This will be great opportunity to round out your educational experience.

MODERATOR

Mike Taylor
Executive Partner
Council Capital
CEO, Alivia Analytics

MEETING TIME

The afternoon has been reserved for attendees to meet with growth partners and/or visit with other attendees. Our large session room will remain open and available for meetings. There are many other smaller meeting areas within the host hotel, as well as nearby venues.



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SIIA CELL AND GENE THERAPY STAKEHOLDER FORUM

May 31 - June 1, 2023

JW Marriott Mall of America

Minneapolis, MN

SIIA members consistently cite Cell & Gene Therapy (CGT) as one of the most important issues affecting the self-insurance industry, with this importance only expected to increase in the years ahead.

Responding to this feedback, SIIA is pleased to announce its inaugural Cell & Gene Therapy Stakeholder Forum. Join leading experts in the field as well as thought leaders from the self-insurance industry who will discuss the ongoing and mounting risk of paying for these potentially life-saving, yet high-cost therapies.

You will leave with detailed knowledge of the CGT pipeline, manufacturer perspective on pricing, value-based pricing consideration, potential financial mitigation/risk strategies, plan document guidance and more.

Attendees will also have multiple opportunities to directly engage with each other, which promises to maximize the knowledge-sharing experience and to help facilitate business partnership opportunities.

Networking and Program highlights include:

CELL & GENE THERAPY – THE BASICS

Discussing cell & gene therapy can be complicated. Before addressing specific industry trends, implications and perspectives throughout the day, this session will cover CGT basics, including definitions and how treatments come to the marketplace.

SPEAKER:

Dr. Surya Singh

Chief Medical Officer

Emerging Therapy Solutions



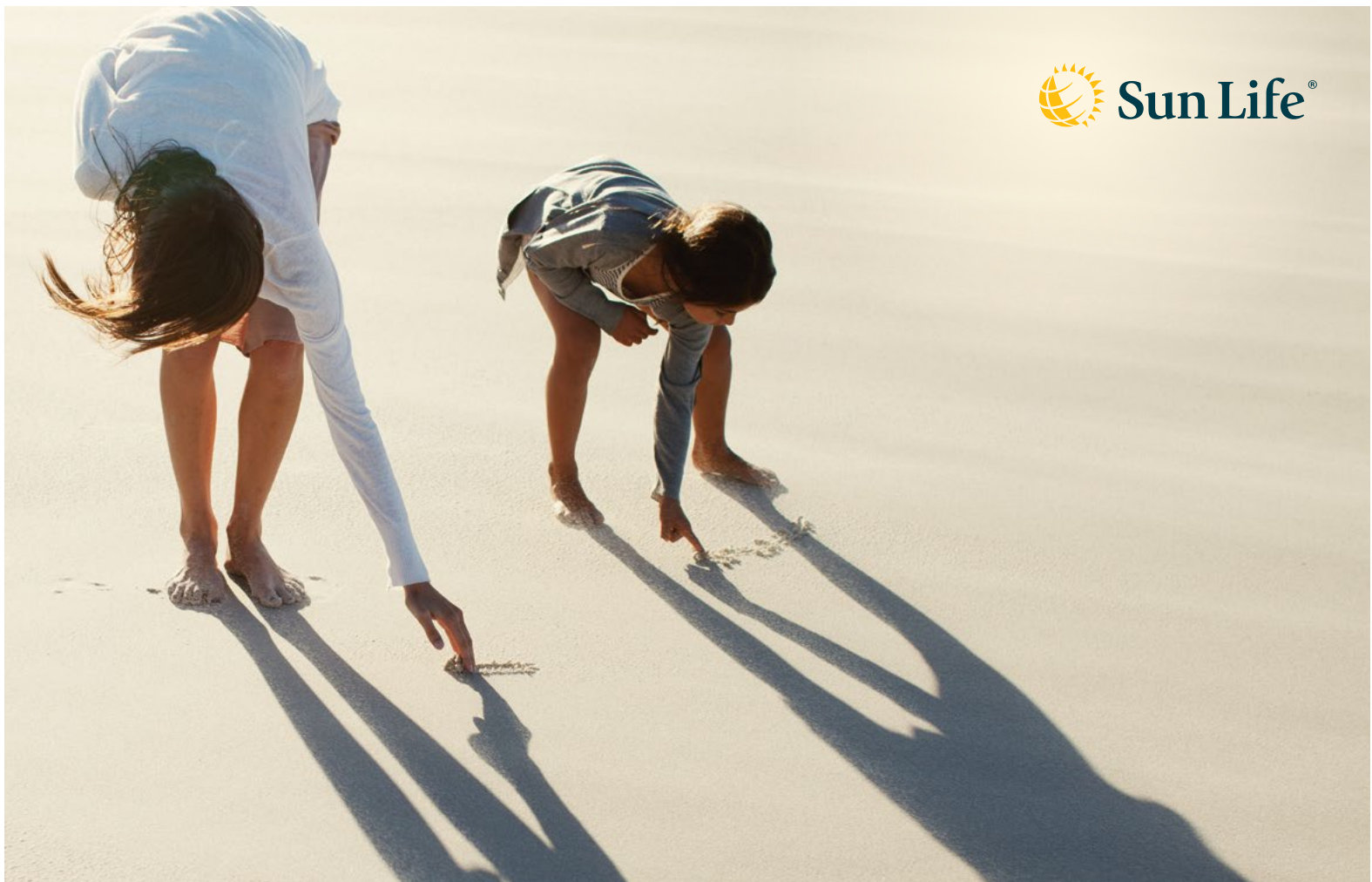
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We would like to invite you to share your insight and submit an article to *The Self-Insurer!* SIIA's official magazine is distributed in a digital and print format to reach 10,000 readers all over the world.

The Self-Insurer has been delivering information to top-level executives in the self-insurance industry since 1984.

Articles or guideline inquiries can be submitted to Editor Gretchen Grote at ggrote@sipconline.net

The Self-Insurer also has advertising opportunities available. Please contact Shane Byars at sbyars@sipconline.net for advertising information.



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

THE MANUFACTURERS PERSPECTIVE

This panel discussion will feature some of the leading CGT manufacturers who will provide an overview of CGT treatments now available and those in the pipeline.

The panel will also address pricing implications existing as well as pending approvals, value-based payments, patient access considerations and development updates for rare diseases.

MODERATOR:

Dr. Surya Singh
 Chief Medical Officer
 Emerging Therapy Solutions

SPEAKERS:

Tim Keyes
 Senior Director US Value, Access & Pricing
 Kite Pharma

Tim Holderman
 National Gene Therapy Commercial Payer Lead
 Spark Therapeutics

Robert Rouse
 Head of Market Access
 CSL Behring

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PLAN DOCUMENT CONSIDERATIONS FOR CGT COVERAGE

As self-insured group health plan sponsors decide whether and how to cover CGT, it is critical that their plan documents are structured properly - don't assume that standard plan document language accounts for CGT. A leading industry expert tells you what you need to know.

SPEAKER:

Jennifer McCormick
Vice President, Consulting
The Phia Group

THE PHYSICIAN AND PATIENT PERSPECTIVES

Physicians and patients obviously have important perspectives on the CGT that could be useful in helping plans make coverage decisions while also assisting their risk partners in making underwriting decisions. A sampling of those perspectives will be provided during this session.

SPEAKERS:

Dr. Paul Orchard
Medical Director of Inherited Metabolic Disease
Program & Professor of Pediatric BMT & Cellular Therapy
University of Minnesota

Erica Barnes
Executive Director
Minnesota Rare Disease Advisory Council

TALKING TO EMPLOYERS ABOUT CGT

Whether you are a broker/advisor, TPA, stop-loss carrier or other service provider, you may have to have "the talk" with your self-insured employer clients about CGT coverage...do you know what to say?

Get some tips during this session from those who have had successful talks with employers, as well as from an employer representative.

MODERATOR:

Ward Humphreys
Senior Vice President, National
Healthcare Practice
Risk Strategies

SPEAKERS:

Cameron Deml
Vice President of Strategic
Business Relationships
Brown & Brown

Jason Ellison
National Healthcare Practice –
Employee Benefits
Risk Strategies

Marty Laskowski
Vice President of Risk
Management
Allied Benefit Solutions

PAYING THE CGT TAB

As costs continue to increase, risk takers are taking a closer look at long term solution strategies that will allow for ongoing CGT coverage - both

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from a stop-loss and reinsurance perspective.

This session will feature an interactive panel discussion - including audience participation - exploring how industry thought-leaders are approaching this challenge.

Kelly Munger- Head of US Health
Partner RE

Shaun Peterson
Head of Health Solutions Pricing
Voya

MODERATOR:

Robby Kerr
Senior Vice President
Tokio Marine HCC

Tasha Barbour
Managing Director, Reinsurance Solutions
Aon

SPEAKERS:

Kristi Bohn
Vice President of Reinsurance
RGA

SHARE, ASK, ANSWER

By now we will have covered a lot of ground. This last hour has been reserved for a “freestyle” discussion where attendees can interact with the speakers and each other to share their experiences, ask questions and help answer questions from others.

Jeremy Freestone
SVP, Medical Stop-Loss
Symetra Financial

MODERATOR:

Dave McClean
CEO
Emerging Therapy Solutions

For more information including registration and sponsorship opportunities for both events, visit www.siia.org. ■

