



NEWS FROM SIIA MEMBERS

2024 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.

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SIIA MEMBER NEWS

SIIA boasts a very active and dynamic membership. Here are some of the latest developments from the companies powering the self-insurance industry.

Blackwell Names New Sales Executive

Blackwell Captive Solutions, a U.S.-based, turn-key group captive solution tailored to meet your needs with fully flexible plan design, service providers, and stop-loss policy terms, announces Scott Lydon as new National Vice President, Sales.



Scott Lydon

“Captives turn emerging risks into opportunities and insulate clients from market volatility,” said Kari L. Niblack, Esq., President of Blackwell Captive Solutions. “Scott has exceptional full-cycle business development experience and will play a dynamic and lead role in defining and executing our long-term strategic goals while continuing to deliver best-in-class solutions to our customers.”

Lydon is an accomplished executive with a proven track record in strategic relationship development and management in the employee benefits sector. In his recent role as Regional Sales Leader at Centivo, Lydon led his team and forged strong relationships with both internal and external partners in the value-based care space. He now brings his passion for creating enduring partnerships and his deep understanding of healthcare cost and affordability drivers to Blackwell Captive Solutions, marking an exciting chapter in Blackwell’s growth and evolution.

“As healthcare costs continue to rise, employers are increasingly looking to captive solutions for cost stability, program flexibility, health risk management strategies, cost transparency, and the potential to be rewarded for great practices to improve employee health. I am thrilled to join the Blackwell Captive Solutions team to help give health benefits stakeholders complete control over their employee benefits,” said Lydon.

Välenz to Acquire Healthcare Bluebook

In a significant development for the healthcare industry, Välenz® Health, a leading platform of integrated cost containment and payment integrity solutions, signed a definitive agreement to acquire Healthcare Bluebook™, an industry-leading healthcare cost and quality navigation platform. The combination will bring together the companies’ complementary offerings and create an integrated member engagement, digital ‘front door’ experience, and payment integrity data platform. The transaction is expected to close within 45 days subject to certain regulatory approvals.

According to public announcements, Healthcare Bluebook combines objective price and quality data with intuitive online navigation capabilities to drive savings

and deliver measurable ROI to consumers and responsible employers nationwide. Healthcare Bluebook is an industry leader in comprehensive cost and quality insights across medical and pharmacy care options for employers and their employees. Valenz Health's many solutions include expansive data sets, care management capabilities, payment integrity solutions and plan performance support. When combined with Healthcare Bluebook, Valenz Health will fulfill what the industry wants and needs to empower members, drive improved health outcomes and simplify healthcare.

Rob Gelb, Chief Executive Officer of Valenz Health, commented: "Together, we will be able to offer a single source of data and solutions on an integrated platform that will make it easier for the industry to execute a healthcare experience that delivers higher-quality, cost-effective and more efficacious care for members. We are exceptionally well positioned to deliver a new pathway for consumers to achieve the Valenz Health promise to engage early and often for smarter, better, faster and more cost-effective healthcare."

HPI Announces Elizabeth Vire Promotion

Health Plans, Inc (HPI) is pleased to announce the promotion

Elizabeth Vire



of Elizabeth Vire to senior vice president of sales and strategic events.

In her new role, Elizabeth will focus on spearheading Sales' strategic growth in the western region of the U.S. while further developing HPI's partnership with EHN. Her expertise will drive cost savings and deliver optimal outcomes for clients while steering HPI Sales and subsidiaries toward continued growth and success. In addition, she will continue working with Sales and Marketing to expand national brand awareness and lead strategic events.

AMS and Amalgamated Life Announce Strategic Partnership

Advanced Medical Strategies (AMS), the premier provider of payment integrity, risk management, and business intelligence solutions, is pleased to announce a strategic partnership with Amalgamated Life Insurance Company (Amalgamated Life), a leading provider of comprehensive insurance benefits and solutions. As part of this partnership, Amalgamated Life will leverage AMS' Predict Platform, including Profiler and CensusRater, to enhance its data analytics capabilities and drive informed decision-making in the healthcare industry.



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Robby Kerr

The collaboration between AMS and Amalgamated Life underscores a shared commitment to innovation, excellence, and customer satisfaction in the healthcare industry. Both organizations are excited about the possibilities that this partnership will unlock and look forward to leveraging the Predict Platform to drive positive outcomes for their stakeholders.

Robby Kerr Promoted to New Position at TMHCC

Tokio Marine HCC (TMHCC) announced that Robby Kerr has been promoted to the newly created position of chief product officer. In this new role, he will be responsible for ensuring that TMHCC's product portfolio continues to evolve to provide policyholders with appropriate risk transfer solutions delivered at a competitive price and relevant to an ever-changing insurance landscape.

"I feel confident that Robby's long-tenured background in the TPA and Stop-Loss industries will serve our Producers and Policyholders well as we drive for superior product execution. He has the unique skill set required to investigate and explore opportunities for continuous advancements in how we deliver a market leading suite of products in a quickly evolving industry." said Jay Ritchie, President & CEO.

Nova Recognized with Health Value Award

Nova Healthcare Administrators, Inc. (Nova) was recently recognized with a 2024 Health Value Award from the Validation Institute in the Claims Processing/TPA/Audit category. The awards celebrate

outstanding services, products, and programs across more than 20 categories in the healthcare industry. Winners were honored at this year's Healthcare Innovation Congress in Washington, DC. They include companies that have gone through the rigorous validation process conducted by the Validation Institute or are peer and self-nominated and are determined by a panel of industry experts and advisors.

Nova was validated by the Validation Institute in the common chronic condition management category, affirming clinical protocols drive measurable improvements in health plan trends. Based on 2023 data, The company's plan participants had the lowest incidence of adverse events, including admissions and emergency room visits for common chronic diseases (asthma, coronary artery disease, congestive heart failure, hypertension, COPD, and diabetes), among all entrants in the Claims Processing/TPA/Audit category, earning the Health Value Award.

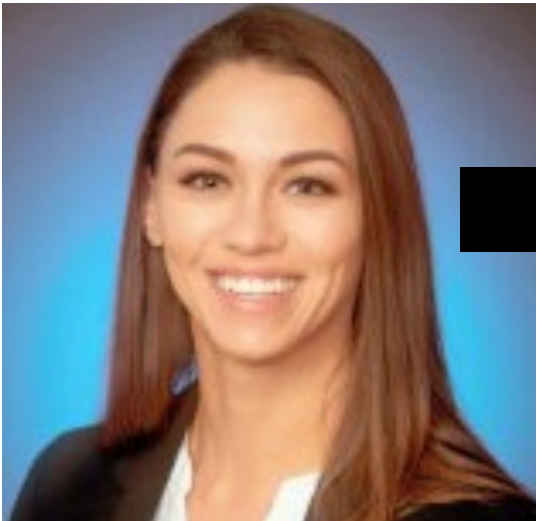
"We are incredibly honored to receive the 2024 Health Value Award from the Validation Institute," said Jim Wallehauser, president, Nova. "This recognition underscores the effectiveness of our approach in managing self-funded benefit plans, which feature programs aimed at improving health outcomes and

managing costs for our clients and their members. Congratulations to our associates across medical management, care navigation, data analytics, and client services for contributing to our top-tier health outcomes in the industry.”

Health Payer Consortium Adds National Sales Executive

Health Payer Consortium (HPC) has named Reanna Pitts as National Vice President of Sales.

“We’re very excited that Reanna decided to join us,” said Patrick J. Crites, President and Co-founder of HPC. “With so many industry experts working directly with our clients and brand-new technology to address the industry’s legacy problems, she will be able to improve our clients’ processes and create a real impact very quickly.”



Reanna Pitts

Reanna graduated Cum Laude from Columbia College-Missouri with a Bachelor of Arts in Psychology. After a successful 12-year career in law enforcement and criminal justice, she began a new career in the insurance industry.

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Kindstedt to Lead Advantage Insurance Management

Christina Kindstedt has been appointed as president at Advantage Insurance Management.

Kindstedt joined the company in 2017 to open its office in Vermont, after working at WTW for more than 14 years. During her time at Advantage Insurance, she has led the team to form and manage different types of alternative risk transfer vehicles whose total annual premium exceeds US\$3 billion.

William Buell, CEO of Advantage Insurance, says: “We recognize Christina’s contribution and are thrilled to give her an elevated platform to do more. “With her new responsibility to develop and execute growth strategies, we expect Christina to replicate her past successes and take Advantage to the next level in the alternative risk transfer industry.”



Christina Kindstedt

Kari Niblack Recognized as Leading Captive Industry Executive

Blackwell Captive Solutions President and founder Kari L.

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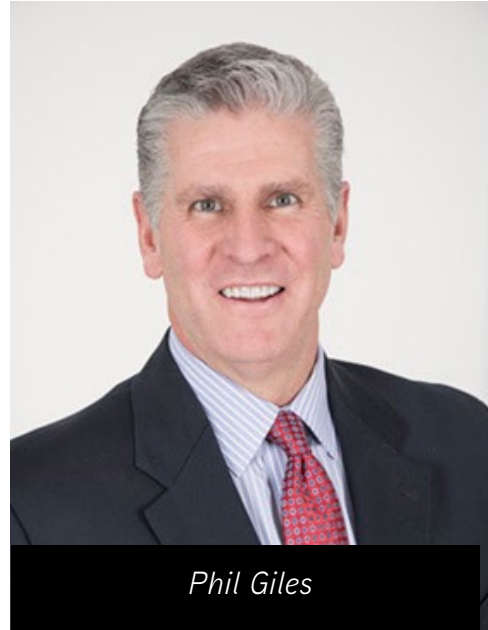
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Niblack has been awarded Captive International's Top 50 Influential Women in Captive Insurance.

Highlighting excellent women leaders in the captive insurance space who have been nominated for transforming the industry for the better, this award closely aligns with Blackwell's unique mission and Kari's distinguished career. Kari's journey is a powerful illustration of resilience and transformative leadership, marked by over 30 years of shattering the status quo with relentless innovation and vision. Fueled by her desire to make a difference, Kari is a voice and tireless advocate for entrepreneurship and women's leadership throughout the employee benefits industry. Her most recent honor is well-deserved for the impact of her work across the captive space and beyond.

"I am deeply honored to have received this recognition from Captive International. Our aim has always been to open more doors to success, opportunity, and better outcomes for our clients, and we look forward to continuing to raise the bar alongside our peers in the captive industry whom I hold in such high esteem," said Kari.



Phil Giles

Phil Giles Joins Skyward Specialty

Skyward Specialty has announced the appointment of Phil Giles as its new Chief Growth Officer for our Accident & Health Division.

During his expansive career, Phil has held varying leadership roles specializing in stop-loss solutions at carriers, including HCC Insurance, Artex Risk Solutions, QBE North America, as well as stop-loss captives MSL Captive Solutions, Inc. and Pinehurst Captive Group.

Phil will play a pivotal role in identifying emerging markets and supporting our expansion efforts. His profound understanding of employee benefit captives will be instrumental in developing strategic solutions that meet the evolving needs of our clients. This leadership change underscores our commitment to providing innovative, consultative solutions within the alternative risk industry.

MSL Captive Solutions Announces New Business Development Leader

MSL Captive Solutions (MSLCS) has appointed Erik Wangenheim as Senior Director, Business Development. He will lead the company's sales, marketing and business development efforts.



Wangenheim joins MSLCS from Crumdale Partners where he was responsible for leading and training a team of regional sales directors and implementing a ground up stop-loss sales strategy.

Prior to Crumdale Partners, Wangenheim spent 10 years as director of business development at Phoenix Excess Risk Underwriters, where he grew the company's book

of business, while increasing persistency of renewals and improving underwriting and quoting processes.

"We are excited to have Erik join the MSL Captives team and work with us to develop our stop-loss captive programs. He brings an enthusiasm for stop-loss and creative cost containment strategies to manage employer's cost of care that fits perfectly with our approach," said Andrew Berry, president, MSLCS.

"I have been very impressed by MSL Captives and its sister companies within Strategic Risk Solutions and what they have developed in the use of captives for stop-loss insurance," said Wangenheim.

Vitable Secures Major Funding to Enable Expansion

Vitable announced that it has raised \$16 million in Series A funding, which it will use to expand into new markets, according to a statement.

The company works with self-funded employers that embed Vitable on top of their existing

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The funding round was led by Cherryrock Capital and included participation from Newark Venture Partners, Citi Impact Fund, First Round Capital, Commerce Ventures and Y Combinator. In total, Vitable has raised more than \$25 million.

Citi Impact Fund invested in Vitable because it “has a big opportunity to positively impact individuals and families in the U.S. by providing new, more affordable healthcare options for shift workers and those working in small businesses,” said Ryan Alam, senior vice president and principal of the fund, in a statement. ■

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SEPTEMBER 2024

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