

PARTNERS IN EDUCATIONAL EXCELLENCE





# 2024 Sponsors



The Society gratefully acknowledges the contributions of these sponsors in support of this year's Symposium.



# **Platinum**

#### **CBIZ**

www.cbiz.com Program at a Glance Tote Bags

#### **Hello Heart**

www.helloheart.com Monday Opening Morning/Afternoon Snacks and Refreshment Breaks

#### Mercer

www.mercer.com Wi-Fi Service Pens

#### Wellfleet

www.wellfleetspecialrisk.com Welcome Reception Charging Station



# Gold

#### **Creative Planning Retirement Services**

www.creativeplanning.com Mobile App

### **Fidelity Health**

www.fidelityworkplace.com/s/health Water Bottle/Hydration Station

#### finHealth

www.finhealth.com
Conversation Corner

#### **Spring Health**

www.springhealth.com Monday Luncheon Roundtables

#### **Voya Financial**

www.voya.com Name Badge Lanyards

#### W/TW

www.wtwco.com Professional Recognition Luncheon



# Silver

#### **Aegis Risk LLC**

www.aegisrisk.com Highlighters

#### JoyScore Inc.

www.joyscore.com Personal Hand Sanitizers

#### **Navitus**

www.navitus.com Post-it® Notes

#### **Woodruff Sawyer**

www.woodruffsawyer.com

#### **Employers Health**

www.employershealthco.com Tuesday and Wednesday Continental Breakfasts

#### **Mayo Clinic**

www.mayoclinic.org Notepads

#### One Medical

www.onemedical.com

#### **Ethos Benefits**

www.ethosbenefits.com

#### Milliman

www.milliman.com Monday Continental Breakfast

#### Rightway

www.rightwayhealthcare.com

Visit www.iscebs.org to learn about Symposium sponsorship opportunities.

(As of September 4, 2024)



### **Aegis Risk LLC**

#### **Ryan Siemers, CEBS**

Principal Aegis Risk LLC

218 North Lee Street, Suite 306, Alexandria, VA 22314

Phone: (540) 668-6401

Email: ryan.siemers@aegisrisk.com

www.aegisrisk.com

Aegis Risk is a specialty consultant and broker focused on medical stop loss and related risk management strategies. We seek solutions for self-funded employer benefit plans and other risk-bearing entities. We partner directly with employers and plan sponsors, as well as other brokers and consultants.

#### Our Value:

Our in-depth knowledge of catastrophic medical claimants and their coverage solutions exceeds that of most benefits advisors—who only cover it occasionally. We obtain the greatest value in protection from this unique risk, while your primary broker or consultant remains focused on the rest.

#### **Our Services:**

Core services include stop loss plan design, as well as carrier marketing and selection. Our expertise and relationships provide highly competitive renewal quotes, including top-rated carrier options not available to other benefits consultants and brokers.

Upon placement of stop loss, we provide ongoing claims monitoring and reimbursement filing—providing peace of mind in using a carrier external to your claims administrator or health plan.

#### Learn More:

Contact us today to discuss our approach, including a complimentary, no-commitment review of your coverage.



#### **CBIZ**

#### Janis Koltun, CEBS

Senior Account Executive CBIZ Benefits & Insurance Services, Inc. 222 South 9th Street, Suite 1000, Minneapolis, MN 55402 Phone: (612) 237-4157 Email: Janis.Koltun@cbiz.com www.cbiz.com

CBIZ is a leading national provider of financial, insurance and advisory services designed to help our clients and their businesses grow and succeed. Founded on the simple idea that growing businesses wanted and needed access to best in class professional services with a personalized, local approach, CBIZ is now one of the largest professional service providers in the country. Our services include group health benefits consulting, accounting, tax and advisory, as well as human capital management, property and casualty and retirement investment services.

For more information, visit www.cbiz.com.







# **Creative Planning Retirement Services**

#### **Cameron Wrennall, CFA**

Managing Director Email: cameron.wrennall@creativeplanning.com

#### Joe Dillon, CFP

Managing Director Email: joe.dillon@creativeplanning.com

#### Ken Zarske

Managing Director Email: ken.zarske@creativeplanning.com

Creative Planning 5454 West 110th Street, Overland Park, KS 66211

Phone: (816) 310-5393 www.creativeplanning.com

Creative Planning Retirement Services mitigates risk for clients' businesses and their employees' financial health. Amidst a complex regulatory environment and increased focus on fiduciary responsibilities, Creative Planning provides retirement services to companies of all sizes, with a focus on comprehensive advice, a disciplined process and client results. From plan design to investment advice, ERISA compliance and participant engagement, we provide the opportunity for your employees to have a financially secure retirement.



### **Employers Health**

#### **Grant Goff, CEBS**

Regional Vice President, Business Development Employers Health 4771 Fulton Drive NW, Canton, OH 44718 Phone: (234) 401-9828 Email: ggoff@employershealthco.com www.employershealthco.com

Employers Health is a leading group purchasing organization for pharmacy benefits. As an independent, employer-founded organization, Employers Health is aligned with the interests of our clients while remaining transparent in our business practices. With more than 350 clients across the country—and working with PBM suppliers CVS Health and Optum Rx—Employers Health provides the expertise, guidance and increased purchasing power that maximizes the value its clients achieve from their pharmacy benefit plans.





#### **Ethos Benefits**

#### **Chelsea Ryckis**

President

Email: chelsea@ethosbenefits.com

Phone: (407) 803-4710

#### **Donovan Ryckis**

Founder & CEO

Email: donovan@ethosbenefits.com

Phone: (407) 803-4710

www.ethosbenefits.com

Ethos Benefits is a fiduciary-driven employee benefits consulting firm supporting employers nationwide in the development and execution of multi-year health care strategies. We inspire employers to think differently about their health care programs, modernizing employee benefits and creating a better benefits experience. We bring transparent strategies that align interests, give the company control over costs and empower employees.

This year, Ethos Benefits was honored with three top benefits recognitions for our work with employers: The Most Innovative Healthcare Consultant of the Year, BenefitsPro Advisor of the Year and the Luminary Award for "Humanizing Benefits," awarded to our service team.

Ethos Benefits also coproduced a documentary set to hit streaming platforms later this year, titled *It's Not Personal, It's Just Healthcare*. From workers battling for access to basic care to employers facing unsustainable premium increases year after year, this documentary pulls back the curtain on why this is happening and how employers can stop it. Prepare to be moved, outraged and inspired to demand change in your own health care program. Spoiler alert: Better health care at a much lower price is easily attainable, and this documentary provides employers with a clear pathway. For more information or to gain early access to the documentary, please visit www.ethosbenefits.com.



### Fidelity Health®

#### **Karen Coomber**

Vice President Fidelity Health®

245 Summer Street, Boston, MA 02210

Phone: (617) 392-0598 (O) | (774) 408-8101 (M)

Email: Karen.Coomber@fmr.com www.fidelityworkplace.com/s/health

Fidelity Health\* is committed to providing comprehensive health benefits solutions that help employees and organizations navigate the health benefits journey with ease. From health saving accounts to flexible spending and reimbursement accounts, health and welfare administrative services, and voluntary benefits, Fidelity Health\* aims to drive confidence among plan sponsors and employees. More than 1,600 organizations and millions of employees currently rely on Fidelity Health\* to help enroll in benefits, manage health expenses and save for health care in retirement. To learn more about our company, visit our website.



#### finHealth

#### Jim Arnold

Founder and CEO Email: jarnold@finhealth.com

Phone: (843) 790-8855

finHealth 717 Green Valley Rd Greensboro, NC 27408

www.finHealth.com

finHealth was founded in 2014 with a mission to "Simplify & Control Healthcare Costs" for innovative, self-funded employers. By offering exceptional transparency to their medical and PBM data, finHealth's proprietary "Analytics-as-a-Service" business model and cost-containment methodologies enable employers to systematically take back control of their health care expenditures. Our powerful AI-enabled platform empowers employers to independently verify that claims are being paid accurately; only for eligible employees, spouses and their dependents; and at competitive market prices. Industryleading insights aid employers in crafting a health plan strategy that simultaneously drives down costs while improving the quality of care by successfully integrating prepayment claim vetting, plan design, payment integrity, contract compliance, utilization management, site of care optimization, network management, population health, employee education, member advocacy and more.



# **W** Hello Heart

#### **Hello Heart**

#### Ryan Akin

Vice President, Employer Sales Phone: (615) 934-7757

Email: ryan.akin@helloheart.com

#### Bianca Lopez, M.Ed.

Consultant Relations Manager Phone: (832) 244-0929

Email: bianca.lopez@helloheart.com

Hello Heart 545 Middlefield Rd Ste 260 Menlo Park, CA 94025-3457

www.helloheart.com

Hello Heart is on a mission to change the way people care for their hearts. The company provides the first app and connected heart monitor that helps people track and manage their heart health and get real-time tips. With Hello Heart, people can take steps to control their risk of heart attacks and strokes the leading causes of death in the United States. With peerreviewed, proven results, high-risk users of Hello Heart have seen meaningful drops in blood pressure, cholesterol and even weight. Recognized as the digital leader in preventive heart health, Hello Heart is trusted by more than 120 leading Fortune 500 and government employers; national health plans; and labor organizations such as 3M, Lenovo, Northwestern Mutual, the Employee Retirement System of Texas (ERS), the South Carolina Public Employee Benefit Authority (PEBA), the City of Fort Worth, and the Cleveland Bakers and Teamsters Pension Fund. Hello Heart clients typically save \$2,382 per enrolled user in the first year of the program, according to an independent analysis by the Validation Institute. Founded in 2013, Hello Heart has raised more than \$138 million from top venture firms such as Khosla Ventures, IVP and Stripes and has been featured in The Washington Post, CNBC, CBS Evening News and NPR. Hello Heart is a best-in-class solution on the American Heart Association's Innovators' Network, CVS Health Point Solutions Management offering and other leading health solution platforms. Visit www.helloheart.com for more information.



# JoyScore Inc.

#### **Bob Singhal**

**CEO** 

2440 Cerritos Avenue, Signal Hill, CA 90755

Phone: (562) 755-0505 Email: drj@joyscore.com www.joyscore.com

#### Find Success Through Joy

We at JoyScore know that true joy and happiness are within everyone's reach. We have developed a unique self-care app that empowers individuals to measure, track, improve and prioritize their well-being. Our personalized approach is designed to help you identify what brings you joy and what holds you back so you can focus on what truly matters.



# **Mayo Clinic**

#### **Dana Baker**

Senior Director, Complex Care Program Phone: (904) 953-2505

Email: baker.dana@mayo.edu

#### **Brent Westra**

Director, Complex Care Program

Phone: (507) 538-1487

Email: westra.brent1@mayo.edu

#### **About Mayo Clinic:**

Mayo Clinic is a nonprofit organization committed to clinical practice, education and research, providing expert, comprehensive care to everyone who needs healing. Learn more about Mayo Clinic at www.mayoclinic.org/about-mayo-clinic.

The Mayo Clinic Complex Care Program is a customizable center of excellence program designed to help provide quick and easy access to Mayo Clinic for high-cost, high-risk employees. By providing high-quality care, this employer health solution can have a significant impact—both on patients' lives and on overall plan costs.

Learn more about the Mayo Clinic Complex Care Program at www.mayoclinic.org/complex-care-program.



#### Mercer

1166 Avenue of The Americas, New York, NY 10036 Phone: (212) 345-5000 www.mercer.com

Mercer believes in building brighter futures by redefining the world of work, reshaping retirement and investment outcomes, and unlocking real health and well-being. Mercer's approximately 25,000 employees are based in 43 countries, and the firm operates in over 130 countries. Mercer is a business of Marsh McLennan (NYSE: MMC), the world's leading professional services firm in the areas of risk, strategy and people.

# **Milliman**

#### Milliman

#### **Ryan Hart, CEBS**

Regional Manager, Health & Group Benefits Consulting Milliman

1301 Fifth Avenue, Suite 3800, Seattle, WA 98101-2646 Phone: (206) 624-7940 www.milliman.com

Milliman insight is driving decisions that affect millions of people around the world. Our innovative work and pioneering technology are helping revolutionize the financing and delivery of health care, the management of risk across complex systems and organizations, and the development of retirement planning and financial risk management solutions.

Changing regulations and rising costs can put pressure on your employee benefits program. Turn to Milliman for independent, innovative, data-driven insights with fresh and informed perspectives to reduce costs, maintain compliance and market competitiveness, and keep your health benefits working for your business and your employees.

Retirement plans today are almost as diverse as the workforces they support. Our retirement experts can help you navigate your options; mitigate your liabilities; and develop flexible, comprehensive approaches to addressing your most complex retirement challenges, including expert plan recordkeeping and administration.



#### **Navitus**

361 Integrity Drive, Madison, WI 53597 www.navitus.com

Navitus Health Solutions, owned by SSM Health and Costco Wholesale Corporation, was founded in 2003 as an alternative to traditional pharmacy benefit manager (PBM) models.

Navitus approaches pharmacy services differently than traditional models. We are purpose-driven to help humans and committed to removing cost from the drug supply chain to make medications more affordable for the people who need them.

We proudly serve over 14 million people through more than 1,000 plan sponsor and health plan client relationships. Our transparent, fully pass-through model enables our clients to achieve their goals and drive desired health and financial outcomes.

To start a conversation, contact us at sales@navitus.com.



# amazon one medical

#### One Medical

#### **Benjamin Milstien**

Client and Consultant Engagement Leader

Phone: 813-297-9230

Email: bmilstien@onemedical.com

www.onemedical.com

One Medical is a national, membership-based primary care practice. We are a modern health care benefit that delivers high-quality health care. From preventative care to chronic illness management and mental health care, One Medical is your team's health care homebase. With 24/7 access to virtual care and over 125 offices across 16 U.S. cities, we're here whenever and wherever they need care.



### **Rightway**

#### **James Powell**

National VP, Provider and Payer Partnerships Phone: 415-216-3526

Email: james.powell@rightwayhealthcare.com www.rightwayhealthcare.com

2 Gansevoort St 7th FL, STE 01 New York, NY 10014

Rightway is the leader in driving health care value for everyone, everywhere. Its care navigation and PBM platforms guide over one million members to the highest-quality care and optimal therapies by inserting clinicians and pharmacists into the member care journey. Powerful technology enables one-on-one clinical guidance at a fraction of the cost of traditional care navigation solutions, reducing health care costs by 15%. Its effective, transparent PBM is the first to deliver fully aligned, pass-through pricing and personalized clinical management, transforming the member experience and lowering employer pharmacy spend by 15%. Companies choose Rightway for its ability to reimagine the consumer experience, drive industry-leading engagement and decrease health care costs.



# Spring Health 🧲

# **Spring Health**

#### Taylor N. Ryan, CEBS

Director, Strategic Alliance Spring Health Email: partnerships@springhealth.com www.springhealth.com

Spring Health is the leading global mental health solution proven to change people's lives and deliver net-positive financial return for organizations. Through Spring Health's Precision Mental Healthcare, individuals and families are connected with personalized interventions and compassionate, culturally responsive mental health care. Certified by the Validation Institute for demonstrating net savings for customers, Spring Health also equips global business leaders with intelligent technology, real-time insights and clinical expertise to support diverse and evolving organizational needs.

Today, more than 10 million people worldwide have access to Spring Health. We're trusted by leading employers, health plans and channel partners, including Adobe, Bumble, Delta, General Mills, Moda Health, Wellstar and Guardian, to drive cultural impact at scale. For more information, please visit www.springhealth.com.



# **Voya Financial**

#### **Stephen Barry**

AVP, Strategic Relationships & Global Solutions Voya Financial 200 West Madison Street, Suite 3840, Chicago, IL 60606 Phone: (312) 422-8569 Email: stephen.barry@voya.com

www.voya.com

Voya Financial, Inc. (NYSE: VOYA), which has rebranded from ING U.S., is a premier retirement, investment and insurance company serving the financial needs of approximately 13 million individual and institutional customers in the United States. The company's vision is to be America's Retirement Company™, and its guiding principle is centered on solving the most daunting financial challenge facing Americans today—retirement readiness. Working directly with clients and through a broad group of financial intermediaries, independent producers, affiliated advisors and dedicated sales specialists, Voya provides a comprehensive portfolio of asset accumulation, asset protection and asset distribution products and services. With a dedicated workforce of approximately 7,000 employees, Voya is grounded in a clear mission to make a secure financial future possible—one person, one family, one institution at a time.

For more information, visit www.voya.com. Follow Voya Financial on Facebook and Twitter at @VoyaFinancial.







#### Wellfleet

#### **Brian Haas, CEBS**

Director of Special Risk Wellfleet

Phone: (201) 724-4139

Email: bhaas@wellfleetinsurance.com

www.wellfleetspecialrisk.com

Wellfleet Special Risk—a division of Wellfleet, a Berkshire Hathaway company—offers participant accident coverage from daycare to day camps, special events, and school activities and beyond.

Together, with coverage including student health insurance, workplace benefits and more, Wellfleet Special Risk helps carry out Wellfleet's corporate mission of protecting people against risk throughout every stage of life.

As a Berkshire Hathaway company, we're proud to offer 30 years of insurance administration experience and an A++ (A.M. Best) carrier rating. For latest ratings, visit ambest.com.



# **Woodruff Sawyer**

#### **Aparna Niroola, CEBS**

Vice President–Employee Benefits Email: aniroola@woodruffsawyer.com

Phone: (657) 234-9949

As one of the largest insurance brokerage and consulting firms in the U.S., Woodruff Sawyer protects the people and assets of more than 4,000 companies. Our unique Employee Benefits approach combines an experienced service team focused on your goals with the latest population health analytics. You get a strategic roadmap for your program and actionable insights to know what's working—all coordinated in a central platform to make your job easier. With a deep understanding of the benefits landscape and your business, we specialize in solving your challenges and optimizing your benefits strategy.

Trust us to get it right.



#### **WTW**

#### Lisa Whiteman, CEBS

Associate Director, Health & Benefits NA Sales Operations Email: Lisa.Whiteman@wtwo.com

#### Chris Wes

Managing Director, Head of LifeSight PEP & DC Strategy Leader Email: chris.west@wtwco.com

www.wtwco.com

#### **Health and Benefits:**

There's a gap between potential and actual health outcomes relative to what companies spend on health and benefit programs. We improve health outcomes for diverse employee populations by ensuring access, quality and affordability of your health care and benefit programs. Combining data analytics, research, benchmarking and technology with our technical expertise, we can help you design, deliver and manage comprehensive and flexible health and benefit programs that create a competitive advantage and enhance well-being.

#### **Investments:**

Institutional investors require portfolios that are tailored to their goals, cost-effective and deliver strong returns with controlled risk. As a company with multi-asset capability and a fiduciary mindset, our investment professionals can help our clients to invest optimally, with a wider mission to change the way the investment industry operates.

#### LifeSight® Pooled Employer Plan:

The retirement landscape is evolving, and you have an opportunity to harness positive change for your employees and your business. Our LifeSight\* Pooled Employer Plan (PEP) is a fully outsourced solution that provides a way for companies of all sizes to deliver competitive retirement benefits to U.S. employees with fewer plan management responsibilities and less risk than traditional 401(k) plans. It's an appealing alternative to delivering 401(k) benefits that allows you to maintain control over core features of the plan design while outsourcing the majority of all other aspects of plan management to us—freeing up time so you can focus on your business.

# Future Symposiums

Plan now to be a sponsor for a future Symposium, and take advantage of this exclusive marketing opportunity!

# **2025 Symposium**

Hyatt Regency Minneapolis Minneapolis, Minnesota September 14-17, 2025

# **2026 Symposium**

Arizona Biltmore Phoenix, Arizona August 23-26, 2026

# **2027 Symposium**

Manchester Grand Hyatt San Diego San Diego, California September 19-22, 2027

# **2028 Symposium**

Austin Marriott Downtown Austin, Texas September 10-13, 2028





Join Us Today! www.iscebs.org | (262) 786-8771

International Society of Certified Employee Benefit Specialists

18700 West Bluemound Road | Brookfield, WI 53045-2936 (262) 786-8771 | Fax (262) 786-8670 | Email: iscebs@iscebs.org

