



WELCOME TO USI'S BENEFITS INNOVATION SYMPOSIUM

JULY 11th | 8:00 am to
2024 | 2:30 pm

Renaissance Indianapolis North Hotel, 11925 North
Meridian Street, Carmel, IN 46032

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Hello & Welcome

We are so happy you are joining us today for USI's Benefits Innovation Symposium. USI recognizes the unique challenges you face in the employee benefits workplace. Therefore, we have brought together professionals across the country with clinical experience in the industry to find innovative and impactful health solutions to help you manage your employees' health conditions and cost containment.

Today, we will take a deeper dive into the types of solutions we have found to positively impact the population of our client partners. We hope this opens your eyes to the wide variety of solutions that can be offered to your employees.

If you have any questions or concerns throughout the symposium, please do not hesitate to reach out to your USI Employee Benefits Consultant.

Best of Health,

Your USI Indiana Employee Benefits Team

Symposium Schedule

Registration Check-in, & Vendor Fair

8:00 AM – 9:00 AM Check-in & Vendor Fair

Breakfast provided by:



Kick Off & Session 1 – USI Pharmacy

9:00 AM – 9:50 AM *Innovative Pharmacy Strategies that ACTUALLY Make a Difference*

9:50 AM – 10:00 AM Intermission & Vendor Fair

Session 2 – USI Funding

10:00 AM – 10:50 AM *Spectrum of Risk*

10:50 AM – 11:00 AM Intermission & Vendor Fair

Session 3 – USI Communications

11:00 AM – 11:50 AM *The Myth of Multigenerational Communication*

Lunch Break – Vendor Fair

11:50 AM – 1:00 PM Intermission, Vendor Fair & Lunch

Lunch provided by:



Session 4 – Innovation Power Hour

1:00 PM – 1:50 PM *Lightning Round of Innovation*

1:50 PM – 2:00 PM Closing Remarks & Vendor Fair

Meet Our Speakers

Session 1

USI Pharmacy and Northwind Pharmaceuticals

Innovative Pharmacy Strategies that ACTUALLY Make a Difference

As the 2024 drug market continues to evolve with the expanding use of weight loss and specialty drugs, employers continue to evaluate innovative approaches to manage drug costs on their pharmacy benefit plan. Traditional approaches to managing drug costs are not having the impact they once did. This presentation will include an overview of the current pharmacy landscape.



Marc Sweeney,
Pharm.D., BCMAS
USI Insurance

[LinkedIn](#)



Katherine Lurk
Pharm.D., BCPS
VP, Clinical Strategies
Northwind Pharmaceuticals

[LinkedIn](#)



Meet Our Speakers

Session 2

USI and Pareto Health

Employee Benefits Captive Solutions that reduce your cost and cap your risk over multiple years.

When most employers think of funding, it is Fully Insured Vs. Self Insured. As employers continue to face rising healthcare costs, more innovation is being brought to the market to address the issue. Please join us to learn some of the newest solutions available to you.



Adam Morgan
Regional Underwriter
USI Insurance

[LinkedIn](#)



Michael Harmon
Vice President
Pareto Health

[LinkedIn](#)



Meet Our Speakers

Session 3

USI Communications

The Myth of Multigenerational Communication

With multiple generations currently in the workforce, is your benefits communications strategy keeping up? Is there really a magic formula for successfully engaging your employees across every generation? Let's talk about it and make a plan for successfully reaching your team, without adding headcount or more work to your plate.



Lindsay Rink
Communications
Consultant
USI Insurance
[LinkedIn](#)



Meet Our Speakers

Session 4

Remodel Health, Surest, and Wellbridge Surgical

Innovation Power Hour

- **Remodel Health** - A leader in transitioning employer plans to individual plans.
- **Surest** – A UnitedHealthcare Company that is reimaging plan design to help employers guide employee to high quality lower cost providers while removing the deductible for the employee
- **Wellbridge Surgical** – A center of excellence offering high quality care with transparent pricing.





TJ Witham,
**Director, National
Business Development**
Remodel Health
[LinkedIn](#)










John Chabot
Mid-Market Sales Leader
Surest
[LinkedIn](#)







Carter Gillie,
Vice President of Sales
Wellbridge Surgical
[LinkedIn](#)





Vendor Name	Contact Info:	Solution	Website
AMPS 	Elizabeth Hojnack, Regional Sales Director	AMPS expands access to affordable, transparent medical and pharmacy care and makes every healthcare dollar go further by continuously enhancing our innovative solutions for employers and healthcare stakeholders.	https://www.amps.com/
Ansel Health 	Jason Clemons, Regional Sales Director	Every Ansel Health plan comes with a benefit for Moderate, Severe, and Catastrophic conditions. Employees can select the payout amounts that fit their needs and their budget. Employers can fund part or all of the premiums—or offer Ansel as a voluntary benefit. The choice is up to you.	https://www.joinansel.com/
Anthem 	Devin Bush, Senior Account Executive	Anthem can help you find a solution that fits your unique situation. Whether you have a couple of employees or over 200,000, you'll find creative solutions designed for the needs of your employees and your business. The innovative benefits our plans offer will help your team stay healthier and can lead to cost savings.	https://www.anthem.com/
Benefits All In 	Matt Reddy, VP Business Development	Benefits All In was created around the idea that everybody has unique individual needs. By merging a simple and intuitive technology interface with world-class enrollment expertise, Benefits All In helps employees and their dependents find the benefits solutions that best fit their individual needs.	https://benefitsallin.com
Crumdale 	Matt Thompson, Regional Sales Director Adam Steger, Regional Sales Director	Integrated and unbundled solutions for flexibility in self-funded and level-funded health plans, pharmacy benefits, stop-loss, actuarial, and compliance needs.	https://crumdalepartners.com/
The Difference Card 	Jennifer Revell, Senior Sales Consultant	The Difference Card administers employee benefit plans for US-based companies. The Difference Card works closely with fully insured and level-funded employer groups to create benefit plans that attract top talent and help organizations retain their workforce. The Difference Card also administers many TPA services such as FSA, DCA, HSA, HRA, LSA, and Fertility HRAs.	www.differencecard.com
First Stop Health 	Megan Weddle, VP of Sales	Help employees access the care they need when they need it most with Virtual Primary Care, Virtual Urgent Care (Telemedicine) and Virtual Mental Health solutions. Employees feel better, faster and more conveniently. Your company saves money from avoided emergency room, urgent care and doctor's office claims.	https://www.fshealth.com/telemedicine-benefits-employers
GIS Benefits 	Shannon Carr, Regional Sales Manager	GIS Benefits leverages strong relationships with top carriers to simplify and expedite the benefits process from plan design through enrollment and administration, to offer clients fast turnarounds, the best guarantee issue amounts, and the lowest participation requirements in the industry.	https://www.gisbenefits.net

2024 SPEAKERS AND VENDOR BOOTH CONTACTS:

Vendor Name	Contact Info:	Solution	Website
<p>Guardian</p> 	<p>Wes Thornhill Senior Sales Consultant</p>	<p>At Guardian, we look at our customers with a whole different perspective — we are inspired by the things that make you “you.” To us, you are more than one phone call or one policy. You’re a loving parent, a proud new homeowner, a nature lover, or a shoulder to lean on. You lead a full life with joys, challenges, and growth. Through it all, we stand behind you on your journey to well-being — mind, body, and wallet®.</p>	<p>https://www.guardianlife.com/</p>
<p>Health Joy</p> 	<p>Mary Kurapat, Regional Sales Executive</p>	<p>HealthJoy is a care navigation platform/benefit that makes it easy for employees to choose the highest-quality care at the best possible cost. Our core focus is to confront long-term healthcare spend and optimize employee benefit and program engagement.</p>	<p>www.healthjoy.com</p>
<p>Lincoln Financial</p> 	<p>Andy Spenser, Group Marketing Representative</p>	<p>To provide financial protection and security to our customers and their families. We do this across our core businesses – annuities, life insurance, group protection and retirement plan services.</p>	<p>https://www.lincolffinancial.com/</p>
<p>Marathon Health</p> 	<p>Jonathan Taylor, VP Sales/KY & IN</p>	<p>Unmatched Access to Employer-Sponsored Healthcare - We focus on the importance of patient-provider moments, and we strengthen them at every turn. By delivering a better patient experience, we improve the health and quality of life for every employee.</p>	<p>www.marathonhealth.com</p>
<p>Northwind Pharmaceuticals</p> 	<p>Katherine Lurk, PharmD., BCPS, VP Clinical Strategies</p>	<p>Northwind offers a national pharmacy services platform that brings the logistics of drug distribution and home delivery pharmacy together with analytics, pharmacy benefits, chronic disease programs, and software to help create a Nexus of Care™ to influence healthcare costs and outcomes.</p>	<p>www.nwpharma.com</p>
<p>Pareto</p> 	<p>Michael Harmon, VP of Sales</p>	<p>Designed for any small or medium-sized employer who wants to take control and start providing real healthcare solutions while curtailing costs. The ParetoHealth benefits captive means a great health plan that you can afford, year after year.</p>	<p>https://paretohealth.com/</p>
<p>Paylocity</p> 	<p>Josh Ford, Connector of People and Technology</p>	<p>We pair easy-to-use technology with personalized service, backed by a culture that truly cares.</p>	<p>https://www.paylocity.com/</p>

2024 SPEAKERS AND VENDOR BOOTH CONTACTS:

Vendor Name	Contact Info:	Solution	Website
<p>PTO Exchange</p> 	<p>David Sherman, Director of Partnerships</p>	<p>PTO Exchange is a flexible benefits platform that turns earned but unused paid time off (PTO) hours into other assets – Employees can redirect the money into their retirement account, pay down student loans, make contributions to the HSA, donate to charitable causes, and more.</p>	<p>https://www.ptoexchange.com/</p>
<p>Regenexx</p> 	<p>Mark Testa, Cost Containment Clinician</p>	<p>Regenexx is pioneering non-surgical regenerative medicine treatments. Our state-of-the-art approaches to joint and sports injuries are tailored to reduce pain and improve function without the need for invasive surgeries.</p>	<p>https://regenexx.com/</p>
<p>Remodel Health</p> 	<p>Justin Clements, Co-founder and President</p>	<p>Provide individualized coverage and white-glove service with ICHRA+®. Remodel Health puts you in control of your health benefits by helping you choose a healthcare solution that meets the needs of your organization and your employees.</p>	<p>https://remodelhealth.com/</p>
<p>Mutual of Omaha</p> 	<p>Taylor Adams, Employee Benefits Sales Representative</p>	<p>For more than a century, Mutual of Omaha has been committed to listening to our customers and helping them through life's transitions by providing an array of insurance and financial products.</p>	<p>https://www.mutualofomaha.com/</p>
<p>SIHO</p> 	<p>John Sadtler Jr, Large Employer Sales Representative.</p>	<p>A transformative approach designed to lower healthcare cost while improving care accessibility through the coordinated efforts of employers, agents, community providers, and SIHO Insurance Services.</p>	<p>www.siho.org</p>
<p>Summus</p> 	<p>Steve Bentley, National Account Director</p>	<p>Summus connects individuals, families and doctors with the right specialist, at any point in the journey, across any health question. Our business is built on the fact that speed of access to high quality medical expertise drives better decisions, and fundamentally changes health outcomes.</p>	<p>https://www.summusglobal.com/</p>
<p>SunLife</p> 	<p>Brian Homan, Senior Employee Benefits Representative</p>	<p>Our purpose: to help Clients achieve lifetime financial security and live healthier lives.</p>	<p>https://www.sunlife.com/en/</p>
<p>Surest</p>  <p>A UnitedHealthcare Company</p>	<p>Danielle Mahon, Strategic Account Executive</p>	<p>Surest redesigned health insurance to allow employers to offer a sustainable, intuitive health benefit without shifting costs to employees.</p>	<p>www.surest.com</p>

Vendor Name	Contact Info:	Solution	Website
<p>Synergy Healthcare</p> 	<p>Dean Kiradjieff, Business Development</p>	<p>Synergy integrates clinical services directly into human resources. By providing independent employer-based support, employees better access care, improve health outcomes and help create cost stability.</p>	<p>https://synergyhealthcare.net/</p>
<p>UKG</p> 	<p>Jeremy Neeley, Account Executive</p>	<p>Our award-winning HR, payroll, workforce management, and culture solutions deliver the full package of guidance, technology, and insights needed to be a great workplace at the right scale for you and your people.</p>	<p>https://www.ukg.com/</p>
<p>Versus Rx</p> 	<p>Julie Wasserman, Market VP of Sales</p>	<p>VerusRx is part of a group of industry-leading healthcare companies. Recognizing a critical need for transparency and accountability in Pharmacy Benefits Management (PBM), VerusRX was formed with the mission of helping employers manage prescription drug costs while improving health outcomes for their employees</p>	<p>https://www.verus-rx.com/</p>
<p>Wellbridge Surgical</p> 	<p>Carter Gillie, VP of Sales</p>	<p>We cut out the intermediaries, provide surgical care for what it costs, and pass the savings on to the patient. This is how WellBridge Surgical is making a positive change to the healthcare system for the benefit of families, individuals, and businesses in Central Indiana.</p>	<p>https://wellbridgesurgical.com/</p>

Partners in Innovation



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Thank You
For Attending
USI'S Innovation Symposium