



WELCOME TO USI'S INNOVATION SYMPOSIUM

March 5 | 7:30 am to
2024 | 5:00 pm

Savannah Center
5533 Chappell Crossing Blvd. | West Chester, OH 45069

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Hello & Welcome

We are so happy that you are joining us today for USI's 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 produce a positive impact on the populations 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 Cincinnati & Dayton Employee Benefits Team

Symposium Schedule

7:30 AM – 8:15 AM
Check-in and breakfast

8:15 AM – 8:30 AM
Opening remarks –
USI Cincinnati/Dayton

Breakout Session 1 - *Attend 1 of the breakout sessions below*

8:30 AM – 9:15 AM ROOM 1: Wellworks For You
ROOM 2: Tuned Care
ROOM 3: Communication Trends
ROOM 4: USI Insurance/Targeted Risk Control

Intermission – Vendor Fair

9:15 AM – 9:30 AM Intermission Vendor Fair

Breakout Session 2 - *Attend 1 of the breakout sessions below*

9:30 AM – 10:15 AM ROOM 1: Wellworks For You
ROOM 2: Tuned Care
ROOM 3: Communication Trends
ROOM 4: USI Insurance/Targeted Risk Control

Intermission – Vendor Fair

10:15 AM – 10:30 AM Intermission Vendor Fair

Breakout Session 3 - *Attend 1 of the breakout sessions below*

10:30 AM – 11:15 AM ROOM 1: Pharmacy Strategies Panel
ROOM 2: USI Consulting Group/Secure Act 2.0
ROOM 3: BenefitBump
ROOM 4: SoulBeing

Intermission – Vendor Fair

11:15 AM – 11:30 AM Intermission Vendor Fair



Symposium Schedule

Breakout Session 4 - *Attend 1 of the breakout sessions below*

11:30 AM – 12:15 PM ROOM 1: Pharmacy Strategies Panel
ROOM 2: USI Consulting Group/Secure Act 2.0
ROOM 3: BenefitBump
ROOM 4: SoulBeing

Lunch Break – Vendor Fair

12:15 PM– 1:15 PM Lunch Break – Vendor Fair

Breakout Session 5 - *Attend 1 of the breakout sessions below*

1:15 PM– 2:00 PM ROOM 1: USI Insurance/Employment Law
ROOM 2: USI Insurance/Compensation
ROOM 3: Funding And Product Spectrum
ROOM 4: Crumdale

Intermission – Vendor Fair

2:00 PM – 2:15 PM Intermission Vendor Fair

Breakout Session 6 - *Attend 1 of the breakout sessions below*

2:15 PM – 3:00 PM ROOM 1: USI Insurance/Employment Law
ROOM 2: USI Insurance/Compensation
ROOM 3: Funding And Product Spectrum
ROOM 4: Crumdale

3:00 PM – 5:00 PM Vendor Fair and Happy Hour

Meet Our Speakers

Breakout Session 1 & 2



[Wellworks For You](#)

Tom Tegler, President
Mental wellbeing and chronic care management in the workplace

Presentation details: Today's presentation will address trends in the population health space and what is evolving for future needs, mental health and the various avenues for support and resources, and the importance of managing conditions to effectively mitigate risk and remove gaps in care.

Who should attend: Everyone

[LinkedIn](#)



[Tuned Care](#)

Leslie Mullins, SVP of Sales

Presentation details: 40% of employers don't have hearing benefits, yet 60% of the 50 million Americans with hearing issues are working age. Join us as we explore Tuned, the first hearing health benefit built around proactive and preventative care.

Who should attend: Everyone

[LinkedIn](#)



Meet Our Speakers

Breakout Session 1 & 2

USI Communications

The Myth of Multigenerational Communication

Presentation details: 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.

Who should attend: Everyone



Lindsay Rink
Communications
Consultant

USI Insurance
[LinkedIn](#)

USI Insurance, Commercial Lines

Targeted Risk Control Program

Presentation Details: A proactive and measurable analysis focused on mitigating future losses and in turn creating positive economic results, improved productivity, culture, employee retention, and continued improvement. Adverse worker's compensation claims have a direct impact on market access and pricing, as well as retained loss costs, heightening the need for robust and effective risk control strategies.

Who should attend: HR, Finance, Employee Safety and Wellness



Sean McGee
Vice President, Commercial
Property & Casualty

USI Insurance
[LinkedIn](#)

Meet Our Speakers

Breakout Session 3 & 4

USI Pharmacy, Northwind Pharmaceuticals, TrueScripts Precision Medicine and Levrx Formulary Management

Innovative Pharmacy Strategies that ACTUALLY Make a Difference

Presentation Details: 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 followed by panelists from three (3) innovative companies bringing impactful solutions to the marketplace. Representatives from TrueScripts, Northwind, and Levrx and will be part of the discussion.

Who should attend: Everyone



**Marc Sweeney, Pharm.D.,
BCMAS**
USI Insurance
[LinkedIn](#)



**Katherine Lurk
Pharm.D., BCPS**
VP Clinical Strategies
Northwind Pharmaceuticals
[LinkedIn](#)



**Alan Kaffenberger,
PharmD, CPGx, Director,**
Clinical & Compliance Programs
TrueScripts Precision Medicine
[LinkedIn](#)



**Kevin Smith, Director,
Channel Partnerships**
*Levrx Formulary
Management*
[LinkedIn](#)

Meet Our Speakers

Breakout Session 3 & 4

[USI Insurance Consulting Group](#)

SECURE 2.0 Act: Opportunities and Challenges for Plan Sponsors

Presentation details: In December 2022, Congress enacted the SECURE 2.0 Act, containing a multitude of provisions intended to improve the retirement plan system. The Internal Revenue Service and Department of Labor recently have issued guidance on the implementation of a number of these changes. From several different industry perspectives, we will discuss the government's recent guidance to employers regarding SECURE 2.0 changes. We will review the transition relief the IRS has granted. We will address new compliance challenges and hurdles plan sponsors may face. Finally, we will explore certain remaining unanswered questions that are puzzling plan sponsors.

Who should attend: Everyone



**Patrick Edwards, VP
Consulting Group**
USI Insurance
[LinkedIn](#)



**Ben Evans,
ERISA Attorney**
USI Insurance



**Hayden Main, Regional Vice
President-Retirement Plans**
John Hancock
[LinkedIn](#)



Meet Our Speakers

Breakout Session 3 & 4



BenefitBump

Sarah Moore, VP of Legal & Business Development

[LinkedIn](#)

Roadmap for Better Maternal Health & Birth Outcomes

Presentation details: Research indicates that addressable risk factors common among expectant parents have a significant impact on birth outcomes. The historical lack of focus on these issues helps explain why maternal outcomes have been persistently worse in the U.S., as compared to other industrialized countries. In this session, BenefitBump will unpack these issues along with sharing potential solutions that employers can implement to improve their bottom line and the wellbeing of their growing families.

Who should attend: Everyone



SoulBeing

Colleen Kavanagh, Chief Executive Officer

[LinkedIn](#)

Julia MacMillan, Regional Director

[LinkedIn](#)

Solving the Access Issue: A New Take on Healthcare Benefits.

Presentation details: Learn how to create an integrated employee benefits strategy that empowers every employee wherever they are on their health journey – focused on preventative health, chronic condition management, or anything in between!

Who should attend: Everyone



Meet Our Speakers

Breakout Session 5 & 6

USI Insurance Services

Benefit Traps & Pitfalls in Leave Administration

Presentation details: Almost all employees will need to take leave at some point, and it can be difficult to properly manage federal, state, and local leave laws that govern such absences. Things only get more confusing when multiple laws might apply at the same time. To make matters worse, employers often overlook the impact that leaves can have on health insurance and other benefits, which can be a very costly mistake to make.

Join us for this session where we will discuss:

- Reductions of work hours that can be COBRA qualifying events
- The types of leave laws that require benefits continuation
- ERISA preemption of state laws
- Common leave law scenarios involving the FMLA, ADA, worker's compensation, military leave, jury duty, state-paid family leave laws, etc.

Who should attend: All sizes and industries.



**James Olney, SVP,
Senior Employment
Law Attorney**

[LinkedIn](#)



**Tracy Melvin, JD, PHR,
SHRM, CP, Employment
Law Attorney**

[LinkedIn](#)

Meet Our Speakers

Breakout Session 5 & 6



Jen Givens, MBA, CCP, SVP Compensation Consulting Practice

[LinkedIn](#)

USI Insurance

Compensation Market Trends: A New Era of Compensation

Presentation details: As we enter 2024, we are also entering a new era of compensation. A tight labor market, new legislation around pay transparency, and artificial intelligence are a few topics challenging the way organizations design and execute compensation programs. This session will focus on what employers need to consider during this pivotal time.

Who should attend: Everyone



Jenny Noel-Brandt, Practice Leader, Employee Benefits

[LinkedIn](#)

Drew Park, Senior Underwriter

[LinkedIn](#)

USI Insurance Services

Funding and Product Spectrum

Presentation details: As employers continue to face rising healthcare costs, more products are being brought to the market to address the issue. Please join us to learn some of the newest solutions available to you and your employees that can help manage future healthcare expenses.

Who should attend: Fully Insured Groups



Meet Our Speakers

Breakout Session 5 & 6

Crumdale Partners

An Innovative Approach To Self-funding

Presentation Details: Crumdale Partners is a diversified insurance firm providing custom, self-funded healthcare solutions. Ranked on the Inc. 5000 Fastest Growing Companies and Best Workplaces, we leverage industry expertise, superior talent, data analytics, and a disruptive mindset to manufacture, underwrite, and administer agile, transparent, and cost-saving solutions. We optimize the fragmented health benefits supply chain to reduce health benefit costs and create better outcomes for employers and employees.

Who should attend: Anyone who is interested in learning more about an innovative, transparent, and predictable way to fund your health insurance.



Reid Noah
Regional Sales Director

[LinkedIn](#)



Scott Brendamour
Regional Sales Director

[LinkedIn](#)



Vendor Name	Contact Info:	Solution	Website
Adyptation	Jack Crotty, Director of Business Development	Adyptation improves health and eliminates unnecessary spend for high-need, high-cost plan members with specialty conditions. We provide employers and their plan members with an alternative way to source specialty Rx, providing immediate financial relief and an improved member experience. In addition to the immediate savings we provide, we save employers money over time by helping these plan members get better care, which keeps them out of the hospital and their need for care at a minimum.	www.adyptation.com
Airrosti	Marcus Otte, Regional Account Manager	At Airrosti, we are committed to resolving pain and injuries at the source. Our patient-focused care allows you to quickly return to pain-free activity. As an effective alternative to surgery and traditional pain management, we have convenient treatment options available nationwide.	https://www.airrosti.com/
Allsup	Hunter Baird, Business Development	Allsup offers a comprehensive suite of services designed to help organizations manage the health and wellbeing of employees and clients and financial risk. We efficiently coordinate group employee benefits with Social Security Disability Insurance (SSDI), Medicare, and Marketplace insurance plans.	https://www.allsup.com/
Amwins	Peter Meyer, VP of Sales	Amwins Group Benefits, we're here to answer the call. That's why we've created a portfolio of capabilities that span the group benefits landscape and deliver them with hands-on service and expertise you can trust.	https://www.amwins.com/solutions/group-benefits
Aura (MetLife)	Michael Bjorkquist, Product Director, and John Mitchell, Product Director	All-in-one digital safety for the whole family, available on every device.	https://www.metlife.com/business-and-brokers/employee-benefits/ www.aura.com
BenefitBump	Sarah Moore, VP Legal and Business Development	Helps employers improve the experience, health outcomes, and retention rates for their growing families. BenefitBump solutions address the maternal health crisis in the U.S.	https://www.benefitbump.com/
Benefits All In (BAI)	Matthew Reddy, VP of 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

2024 SPEAKERS AND VENDOR BOOTH CONTACTS:

Vendor Name	Contact Info:	Solution	Website
BrightPlan	Max VanAntwerp, Sr. Account Executive	The financial wellness benefit makes it easy for HR and business leaders to enhance the employee experience, improve productivity, and drive a positive impact on your business.	https://www.brightplan.com/
Calm	Kristi Shaffer, Field Marketing Manager	Mental health is hard. Getting support doesn't need to be. Our app puts the tools to feel better in your back pocket, with personalized content to manage stress and anxiety, get better sleep, and feel more present in your life. Relax your mind and wake up as the person you want to be.	Calm - The #1 App for Meditation and Sleep
Crumdale	Reid Noah, Regional Sales Director Scott Brendamour, 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 Christ Hospital/ Key Benefit Administrators	Ken Schorsch, Director of Business Development Leslie Isler, Sales Executive	Key Benefit Administrators (KBA) is a nationally recognized employee benefit expert because of our competency in working with complex healthcare administration and risk management. We have developed the oldest and largest database on which a consistently applied patented process of population management techniques has been used by us since 2002.	https://keybenefit.com/about-us/
Difference Card	Jennifer Revell, Senior Sales Consultant	The Difference Card administers employee benefit plans for US-based companies, often creating savings by designing unique health plan designs that fit each employer's specific needs. Focused on providing better benefits at a better price, 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.	https://www.differencecard.com/
Enspire	Sara Harris, Director of Business Development	Custom branded employer app and communication platform for your workforce.	https://enspire.com/
Jellyvision	Debbie Walker, Sr. Channel Sales Manager	Powered by predictive analytics, backed by behavioral science, and easy to use. ALEX Decision Support offers an inclusive experience that supports employees while they choose and use their benefits—throughout all stages of their career and life.	https://www.jellyvision.com/
John Hancock	Hayden Main, Regional VP Retirement Plans	For over 160 years, we've been helping our partners build their life insurance businesses and helping their clients protect what matters most.	https://www.johnhancock.com/financial-professionals/life-insurance.html
LevrX	Kevin Smith, Director, Channel Partnerships	The LevrX Platform digitally connects payers, providers, pharmacies, and patients to improve the healthcare experience, one prescription at a time. The LevrX Platform is powered by Roxanne A.I.™, our innovative technology that drives actionable insights straight to providers and patients.	https://levrx.com/

2024 SPEAKERS AND VENDOR BOOTH CONTACTS:

Vendor Name	Contact Info:	Solution	Website
Marathon Health	Eric Neuville, VP Health Care Consultant	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.	https://www.marathon-health.com/
MoveSpring	Anthony Knierim, COO	Make fitness fun at your organization. Encourage your employees to get moving with some friendly competition. Run a company fitness challenge.	https://movespring.com/employee-wellness
Northwind Pharmaceuticals	Katherine Lurk, PharmD., BCPS, VP Clinical Strategies	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.	https://www.nwpharma.com/
Omada Health	Joshua Hermalik, Regional VP of Sales	Omada is one of the most comprehensive digital care providers out on the market today that focuses on holistic health and wellbeing. A virtual-first, integrated solution to care, Omada helps members make mindset changes to make lasting health changes on their terms.	https://www.omadahealth.com/platform
Pareto	Laura Fox, Regional Vice President	Pareto Health Benefit Captive - 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.	https://paretohealth.com/
Paytient Health	Tip Millard, Sr. Director of Strategic Alliances	Paytient's Health Payment Account (HPA) empowers people to pay for care over time with no interest and no fees — ever. Let's help your people access and afford care.	https://www.paytient.com/
Personify Health (Virgin Pulse)	Anjali Mehta	Convert your protocols into digital patient pathways to prepare patients for admission & support post-discharge recovery.	https://personifycare.com/
Rightway	Jordon Kozlowski, VP of Sales	Rightway's care navigation and pharmacy benefits harmonize healthcare around every member. Our clinical care teams guide members to better healthcare decisions while helping plan sponsors attack the largest categories of healthcare spend.	https://www.rightwayhealthcare.com/

2024 SPEAKERS AND VENDOR BOOTH CONTACTS:			
Vendor Name	Contact Info:	Solution	Website
Simple Therapy	Jeremy Oswald, President	Simple Therapy provides instant access to a comprehensive musculoskeletal solution.	https://www.simpletherapy.com/
SoulBeing	Julia MacMillan, Regional Director Colleen Kavanagh, CEO	At SoulBeing, we are committed to helping each person achieve their health, wellbeing, and performance goals by focusing on whole person health: physical, mental, emotional, and functional health.	https://soulbeing.com/
Spot Pet Insurance	Ethan Jones, VP of Sales	America's Most Loved Pet Insurance <ul style="list-style-type: none"> • Up to 90% Cash Back on Vet Bills • Visit Any Vet in the U.S. or Canada • 10% Multi-Pet Discount • 24/7 Pet Telehealth Helpline 	https://spotpetins.com/
Surest	Danielle Mahon, Strategic Account Executive	Surest redesigned health insurance to allow employers to offer a sustainable, intuitive health benefit without shifting costs to employees.	https://www.surest.com/
Tria Health	Jim Winne, Sr. Vice President	Tria Health provides a comprehensive health benefits solution for self-insured employers to prevent and manage chronic conditions. This strategy not only reduces costs for employers but also enhances the health of employees. Pharmacists play a key role in Tria Health's approach, leveraging their expertise in medications to analyze why individuals may not achieve their healthcare goals. Through individual one-on-one consultations, our pharmacists serve as coaches, guiding patients through their individual health journeys, improving health literacy, addressing care gaps, and optimizing pharmacy utilization.	https://www.triahealth.com/
TriHealth	Colleen Kasper, Marketing Consultant John Jacobs, Senior Director of Corporate Health	For more than 40 years, organizations have turned to TriHealth for its expertise in employee care. From onsite nursing and medical services to custom wellness programs and health coaching, TriHealth Corporate Health has helped companies across the region lower costs and improve their workforce health. Our deep knowledge of employer challenges combined with our integrated health system allows TriHealth to be uniquely positioned to help build a healthier, safer, and more productive workforce.	https://www.trihealth.com
TrueScripts	Alan Kaffenberger, PharmD, CPGx, Director, Clinical & Compliance Programs	When it comes to navigating the prescription drug coverage portion of your plan, let us be the experts! Our team of nurses, pharmacists, and care specialists will do the work while providing transparency and education that keeps you involved and in the know.	https://www.truescripts.com/
TunedCare	Leslie Mullins, SVP of National Sales	THE COMPREHENSIVE HEARING BENEFIT- Tuned is the first benefit designed to bring hearing health to everyone	https://www.tunedcare.com/

2024 SPEAKERS AND VENDOR BOOTH CONTACTS:

Vendor Name	Contact Info:	Solution	Website
USI Consulting Group	Patrick Edwards, Vice President of Retirement Services Ben Evans, USI Consulting Group, Senior Consultant	Our integrated team of highly skilled professionals provides specialized expertise in delivering independent, comprehensive guidance and innovative, flexible retirement solutions for thousands of clients nationwide. Our clients consist of public and private sector employers, not-for-profit organizations and Fortune 500 companies.	www.usi.com
USI Communication	Lindsay Rink, Sr. Communications Consultant	USI builds a communication strategy that is most suited for your company, utilizing technology tools and resources to effectively reach your diverse population. USI goes beyond employee benefit guides and integrates technology to ensure that we send the right message, at the right time, through the most effective medium.	www.usi.com
USI Commercial Lines	Sean McGee, VP of Commercial Property and Casualty	USI analyzes client business issues and challenges leveraging USI ONE™, a proprietary platform integrating analytics, networked resources, and strategic planning to deliver highly customized solutions with economic impact.	www.usi.com
USI Pharmacy	Marc Sweeney, Pharm.D., USI Pharmacy Consultant	Experience the USI ONE Advantage® and learn how our pharmacy tools, program management and pricing strategies provide cutting edge, transparent, cost management capabilities to reduce pharmacy spend and enhance employee offerings.	www.usi.com
USI Underwriting	Drew Park, Sr. Underwriter	USI's Underwriting and Analytics team scrutinizes employee benefits plan data to ensure programs are innovative, measured, and aggressively priced. Our team deconstructs employer claims spend into outlying cost drivers that fuel increases and offers actionable solutions to optimize plan features and reduce expenses.	www.usi.com
Voya	Dean Spalding, Regional Vice President Hannah Smith, Senior Sales Representative	Workplace benefits and retirement savings that work. We're connecting workplace benefits and savings, simplifying the experience and helping make a more secure financial future possible — one person, one family, one institution at a time.	https://www.voya.com/
Wellworks For You	Tom Tegler, CEO, President	Wellworks is a comprehensive wellness company established in 2009 managing over two million members in the wellbeing space. The company and its team members are consistently expanding the resources provided to clients and the marketplace. The newest services include mental health, analytics, and occupational health. Wellworks continues to evolve and stay in front of the market in a continued effort to be proactive and bring resources to our clients.	www.wellworksforyou.com

Thank you to our sponsors



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Thank You
For Attending
USI'S Innovation
Symposium