



# WELCOME TO USI'S INNOVATION SYMPOSIUM

May 13  
2025 | 7:30 am -  
1:30 pm

Columbus Crew Stadium  
96 Columbus Crew Way, Columbus, OH 43215

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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 Advisor.

Best of Health,

Your USI Columbus Employee Benefits Team



# USI's Innovation Symposium

May 13, 2025

## Speaker Schedule

Check-in and breakfast

7:30 AM – 8:15 AM

Opening remarks –  
USI Columbus

8:15 AM – 8:30 AM

### **Session 1 – USI Population Health Management**

8:30 AM to 9:15 AM

Hosted by Cory Panning, PHM Consultant

- Cheryl Lee Eberting – AZOVA
- Dr. Melody Hartzler, Pharm to Table

### **Session 2 – Pharmacy Panel**

9:30 AM to 10:15 AM

Hosted by Marc Sweeney, Pharmacy Consultant

- Kurt Hardin, MedBenRx
- Todd Edwards, LevRx
- Kelly Chillingworth, Integrity Rx

### **Session 3 – Cost Containment Panel**

10:30 AM to 11:15 AM

Hosted by Vince Giacalone, Employee Benefits Practice Leader

- Priyang Shah, Healia
- David Check, Apex-MEC
- Danielle Mahon, Surest

### **Lunch and Vendor Fair**

11:30 AM to 12:30 PM

### **Keynote Address**

12:30 PM to 1:30 PM - Keynote Speaker

Hosted by Alex Sheen– Because I Said I Would

*Join us for a tour of Crew Stadium after the event, from 1:30 – 2:00 pm*



# Meet Our Speakers

## **Session 1**

### **USI Population Health Management - Azova Health and Pharm to Table**

#### ***Preventive Care 3.0 – A Whole Person Approach***

Join us as we share the next evolution of preventive care and strategies on the elements that enable a comprehensive whole health approach to wellbeing. We will explore the digital health technologies that set the stage for efficient, accessible, affordable, and sustainable strategies that impact the employer's bottom line and the participants' long-term health. These will drive intelligent resource allocation, better outcomes, and lower costs.



**Cory Panning**  
**Regional Population  
Health Consultant**  
*USI Insurance*  
[LinkedIn](#)



**Cheryl Lee Eberting, M.D.**  
**CEO and Founder**  
*Azova Health*  
[LinkedIn](#)



**Dr. Melody Hartzler**  
**Director, Functional Medicine**  
*Azova Health*  
[LinkedIn](#)

# Meet Our Speakers

## **Session 2**

**USI Pharmacy Panel, MedBenRx, LevRx & Integrity Rx**

### ***Innovative Solutions to Pharmacy Challenges 2025***

With rising drug costs, often attributed to GLP-1 and specialty drugs, employers are looking for solutions to mitigate costs.

This session will provide an overview of the pharmacy landscape of 2025 and presentations by MedBenRx, LevRx, and IntegrityRx that are bringing innovative solutions to the market. This session will include a panel discussion with all presenters.



**Marc Sweeney,**  
**Pharm.D., BCMA**  
**Pharmacy Consultant**  
*USI Insurance*  
[LinkedIn](#)



**Kurt Harden**  
**President and CEO**  
*MedBen Rx*  
[LinkedIn](#)



**Todd Edwards**  
**Senior Vice President**  
*LevRx*  
[LinkedIn](#)



**Kelly Chillingworth**  
**Managing Partner**  
*Integrity Rx*  
[LinkedIn](#)

# Meet Our Speakers

## **Session 3**

### **USI Cost Containment Panel – Healia, Apex-MEC and Surest**

**Healia:** Healia is reinventing health insurance for dual-income families. Our product allows companies to pay for the out-of-pocket costs of any employee who enrolls in their spouse's health insurance plan. This saves customers \$10k per enrollee while providing an incredible employee perk: 100% coverage of a family's health costs. We handle setup, employee education, and claims reimbursement.

**Apex-MED:** Apex-MEC provides employers with comprehensive Minimum Essential Coverage (MEC) plans that not only ensure PPACA compliance but also enhance employee benefits.

**Surest:** Surest redesigned health insurance to allow employers to offer a sustainable, intuitive health benefit without shifting cost to employees.



**Vince Giacalone**  
**President, Employee Benefits**  
*USI Insurance*  
[LinkedIn](#)



**Priyang Shah**  
**CEO/Founder**  
*Healia*  
[LinkedIn](#)



**David Check**  
**Territory Manager**  
*Apex-Mec*  
[LinkedIn](#)



**Danielle Mahon**  
**Executive**  
*Surest*  
[LinkedIn](#)

# Keynote Speaker

## Alex Sheen, Because I Said I Would

As one of the world's foremost experts on accountability and commitment, Alex is a five-time TEDxTalk speaker, [author](#), [podcast](#) host, internationally-recognized humanitarian and Founder of the *because I said I would* movement. His work has been featured on the TODAY Show, Good Morning America, the Steve Harvey Show, CNN, Fox News and many other programs.



**Alex Sheen, Founder  
Because I Said I  
Would**

## Alex Sheen, Inspirational Speaker





**SPEAKERS AND VENDOR BOOTH CONTACTS:**

Vendor Name	Contact Info:	Solution	Website
<b>ADP</b>	Michelle Kenley, District Manager	At ADP, our team's mission transcends mere process improvement; we empower organizations to optimize their most valuable asset—their people.. ADP's dedication to adaptive Human Capital Management (HCM) and compliance solutions supports companies in focusing on core business goals, a testament to our expertise.	<a href="https://www.adp.com">https://www.adp.com</a>
<b>Aflac</b>	Coleman Fitch, Group Representative	Aflac is an insurance company that specializes in supplemental insurance, providing coverage for expenses that might not be covered by traditional health insurance, such as accidents, cancer, critical illnesses, and more.	<a href="https://www.aflac.com">https://www.aflac.com</a>
<b>Apex-Mec</b>	David Check, Territory Manager	Apex-MEC provide employers with comprehensive Minimum Essential Coverage (MEC) plans that not only ensure PPACA compliance but also enhance employee benefits.	<a href="https://www.apex-mec.com">https://www.apex-mec.com</a>
<b>Azova</b>	Cheryl Lee Eberting, CEO and Founder of AZOVA	AZOVA offers the industry's only all-in-one wellness solution with our Whole Health membership program and connected digital health ecosystem. With a focus on prevention and root cause medicine, we help your employees identify and effectively manage health risks while reducing your healthcare costs.	<a href="https://www.azova.com/">https://www.azova.com/</a>
<b>Benefits All In (BAI)</b>	Jessica Davis, Sales Operations Executive	Benefits All In offers a client focused solution which combines individualized benefits expertise and education with best-in-class enrollment technology to ensure employees and their families choose the benefits that best suit their particular needs.	<a href="http://www.benefitsallin.com">www.benefitsallin.com</a>
<b>BMI Audit</b>	Will Baker, Sales Director	We help organizations uncover who and what healthcare dollars are being spent on by digging into benefits data and verifying if, the right people are enrolled in the plan and if healthcare claims are accurate per plan design.	<a href="http://www.bmiaudit.com">http://www.bmiaudit.com</a>
<b>Claim Choice TPA</b>	Brett Wilkinson, President and Chief Claims Officer	ClaimChoice leverages technology to create a smarter self-funded plan taking care of members and employer plan assets by offering the ultimate in member experience through our care directives and engagement. ClaimChoice drives simplicity and transparency, putting members in control of their healthcare experience.	<a href="https://claimchoice.com/">https://claimchoice.com/</a>
<b>Custom Design Benefits</b>	Cory Thum, Regional Sales Manager	Custom Design Benefits (CDB) is a dynamic, service-oriented organization specializing in the administration of self-funded health benefits, compliance services such as FMLA, COBRA, and consumer-driven services. We are recognized as a national leader in the development and implementation of reference-based pricing health plans and other innovative cost containment services for employee benefits.	<a href="https://www.customdesignbenefits.com/">https://www.customdesignbenefits.com/</a>
<b>The Difference Card</b>	Jennifer Revell, Senior Sales Consultant	The Difference Card is 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. The Difference Card also administers many TPA services such as: FSA, DCA, HSA, HRA, LSA and Fertility HRAs.	<a href="http://www.differencecard.com">www.differencecard.com</a>
<b>Eye Med</b>	Alex Stothfang, Senior Sales Executive	EyeMed Vision Care is a leader in vision insurance benefits. We deliver stand-out vision benefits centered around an outstanding member experience. EyeMed boasts America's largest vision network with a diverse network of independent ODs, retail and online providers.	<a href="https://eyemed.com">https://eyemed.com</a>
<b>Healia</b>	Priyang Shah, CEO and Founder	Healia is reinventing health insurance for dual-income families. Our product allows companies to pay for the out-of-pocket costs of any employee who enrolls in their spouse's health insurance plan. This saves customers \$10k per enrollee while providing an incredible employee perk: 100% coverage of a family's health costs.	<a href="https://healiahealth.com">https://healiahealth.com</a> .



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Vendor Name	Contact Info:	Solution	Website
<b>HSA Bank</b>	Brad Frank, Area Vice President	HSA Bank is a leader in benefit accounts (HSAs, FSAs, HRAs and more) for over two decades. They have the depth and breadth of expertise that matters most. HSA Bank is devoted to delivering an outstanding user experience and offering healthcare savings to drive down healthcare costs, increase access, and assist with decision-making for individuals, employers and partners.	<a href="http://www.hsabank.com">http://www.hsabank.com</a>
<b>Insperty</b>	Kristina Bergeron, Senior Channel Program Manager	Insperty offers the most comprehensive suite of scalable HR solutions available in the marketplace. Insperty is defined by an unrivaled breadth and depth of services and level of care. Through an optimal blend of premium HR service and technology, Insperty delivers the administrative relief, reduced liabilities and better benefit solutions that businesses need for sustained growth.	<a href="https://www.insperty.com/">https://www.insperty.com/</a>
<b>Integrity Rx</b>	Kelly Chillingworth, RPh, MHA-Ed, Pharmacy Benefit Consultant	Integrity Rx helps clients take greater control of their pharmacy benefit. Their goal is to secure a better contract by injecting expertise and technology into the renewal or RFP process. By leveling the information gap when you look at PBMs, you can finally act on accurate pricing data, including rebates. The contract secured is enforceable, and they hold the PBM accountable to their guarantees, including recovering shortfalls. A strong contract is just the foundation.	<a href="https://www.integrityrx.com">https://www.integrityrx.com</a>
<b>LevRx</b>	Todd Edwards, Senior Vice President of Sales	LevrX is digitally connecting payers, providers, pharmacy, and patients in a way that drives actionable insights straight to providers and patients. This level of point-of-care transparency is unique in the healthcare field, and we are proud to fuel it with our Roxanne A.I.™ innovative technology	<a href="https://www.levrx.com">https://www.levrx.com</a>
<b>Luminare Health</b>	David Willett, Regional Sales Director	Luminare offers curated solutions for telemedicine, cost and quality metrics, behavioral health, chronic condition management, population health management, reference-based pricing, and stop-loss. We can also integrate with client-selected solutions to give employers, brokers, carriers, hospitals, school systems, and indigenous nations exactly what they're looking for.	<a href="https://www.luminarehealth.com/">https://www.luminarehealth.com/</a>
<b>MedBenRx</b>	Kurt Harden, President and CEO	A leader in benefits management since 1938, MedBen excels in finding ways to help employer groups save money on their health care coverage by delivering proven solutions for self-funded health plans. Our extensive service portfolio includes third party administration, consumer-driven products and worksite wellness.	<a href="https://www.medben.com">https://www.medben.com</a>
<b>Modern Health</b>	Travis Metivier	Modern Health is the comprehensive global mental health solution offering employees access to one-on-one, group, and self-serve digital resources for their emotional, professional, social, financial, and physical well-being needs - all within a single platform.	<a href="https://www.modernhealth.com">https://www.modernhealth.com</a>
<b>Paylocity</b>	Chris Robinson, Account Executive	Paylocity is an intuitive, easy-to-use product suite that helps businesses automate and streamline HR and payroll processes, attract and retain talent, and build culture and connection with their employees.	<a href="https://www.paylocity.com">https://www.paylocity.com</a>

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Vendor Name	Contact Info:	Solution	Website
<b>Pharm to Table</b>	Melody Hartzler, Clinical Pharmacist and CEO	PharmToTable started as a blog to share my story as a pharmacist learning about functional and integrative medicine. It now has a platform for pharmacists and other health care providers to provide telehealth consults for functional medicine and chronic disease management.	<a href="https://pharmtotable.life">https://pharmtotable.life</a>
<b>QBE</b>	Carly Fisher, VP Business Development	QBE Insurance Group Ltd. (QBE) is a general insurance and reinsurance company that offers a variety of non-life insurance solutions for both individuals and businesses.	<a href="https://www.qbe.com">https://www.qbe.com</a>
<b>Quantum Health</b>	Eileen Duffy, Consultant Relations	Healthcare doesn't have to be a hassle. Quantum Health enhances the value of your benefits by advocating, guiding and supporting every employee throughout their healthcare journey. Our human-centered approach integrates personalized interactions with advanced GenAI-powered insights, resulting in a seamless member experience.	<a href="https://quantum-health.com/">https://quantum-health.com/</a>
<b>Ryan Specialty Benefits</b>	John Zern, CEO	Ryan Specialty Benefits (RSB) unites exceptionally skilled underwriters and actuaries, combined with our clinical experts (medical and pharmacy), all underpinned by data-driven intelligence. Our spectrum of solutions is flexible for your clients and includes level-funded plans, traditional stop losses well as single parent and group captives.	<a href="https://rsbenefits.com">https://rsbenefits.com</a>
<b>Spring Health</b>	Parmpreet Mann, Director of Strategic Alliances	Spring Health™ is a comprehensive mental health solution for employers and health plans. Unlike any other solution, we use Precision Mental Healthcare to seamlessly pinpoint and deliver exactly the right fit for each person - whether that's digital support, meditation exercises, coaching, therapy, medication, and beyond.	<a href="https://www.springhealth.com">https://www.springhealth.com</a>
<b>Surest</b>	Danielle Mahon, Executive	Surest, a UnitedHealthcare company, offers a no-deductible, no coinsurance health plan where members can check costs and compare options before making an appointment.	<a href="https://www.surest.com/">https://www.surest.com/</a>
<b>Teladoc</b>	Pete Coen, RVP, Broker Sales	Teladoc Health empowers all people everywhere to live their healthiest lives by transforming the healthcare experience. As the world leader in whole-person virtual care, Teladoc Health uses proprietary health signals and personalized interactions to drive better health outcomes across the full continuum of care, at every stage in a person's health journey.	<a href="http://www.teladochealth.com/">http://www.teladochealth.com/</a>
<b>TriNet</b>	Joseph Greenwood, Sales Consultant	TriNet provides full-service HR solutions, so you get time back to focus on your business, your employees get HR support, and your business gains the HR guidance it needs.	<a href="https://www.trinet.com.">https://www.trinet.com.</a>
<b>Unum</b>	Toby Birnbrich, Senior Sales Consultant	Advanced solutions and seamless integrations help make benefits easier, more effective, and better connected to the modern workforce. Your employees are the lifeblood of your company — that's why you do all you can to help safeguard their health and wellbeing. With better digital experiences and a wide range of flexible benefits, Unum offers financial protection designed to keep them going while moving your business forward.	<a href="https://www.unum.com/">https://www.unum.com/</a>
<b>Zomo Health</b>	Brian Patterson, Client Engagement Manager	Zomo Health strives to make health management convenient for clients and participants through personalized programs that create health awareness, drive engagement, achieve lasting behavior change, and educate participants on being smarter health care consumers. Their high-touch approach to management, marketing, and program delivery produces measurable outcomes and Return On Investment (ROI).	<a href="https://www.zomohealth.com">https://www.zomohealth.com</a>

# Thank you to our sponsors



## Contact Us:

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For Attending  
USI'S Innovation  
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