



WELCOME TO USI'S INNOVATION SYMPOSIUM

May 13 | 7:30 am -
2025 | 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., BCMAS
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
ADP	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.	https://www.adp.com
Aflac	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.	https://www.aflac.com
Apex-Mec	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.	https://www.apex-mec.com
Azova	Cheryl Lee Eberling, 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.	https://www.azova.com/
Benefits All In (BAI)	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.	www.benefitsallin.com
BMI Audit	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.	http://www.bmiaudit.com
Claim Choice TPA	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.	https://claimchoice.com/
Custom Design Benefits	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.	https://www.customdesignbenefits.com/
The Difference Card	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.	www.differencecard.com
Eye Med	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.	https://eyemed.com
Healia	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.	https://healiahealth.com.

SPEAKERS AND VENDOR BOOTH CONTACTS:

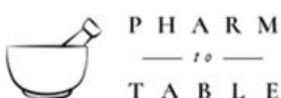
Vendor Name	Contact Info:	Solution	Website
HSA Bank	Brad Frank, Area Vice President	HSA Bank is a leader in benefit accounts (HSAs, FSAs, HRAs and more) for over two decades. They have the depth and breadth of expertise that matters most. HSA Bank is devoted to delivering an outstanding user experience and offering healthcare savings to drive down healthcare costs, increase access, and assist with decision-making for individuals, employers and partners.	http://www.hsabank.com
Insperity	Kristina Bergeron, Senior Channel Program Manager	Insperity offers the most comprehensive suite of scalable HR solutions available in the marketplace. Insperity is defined by an unrivaled breadth and depth of services and level of care. Through an optimal blend of premium HR service and technology, Insperity delivers the administrative relief, reduced liabilities and better benefit solutions that businesses need for sustained growth.	https://www.insperity.com/
Integrity Rx	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.	https://www.integrityrx.com
LevRx	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	https://www.levrx.com
Luminare Health	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.	https://www.luminarehealth.com/
MedBenRx	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.	https://www.medben.com
Modern Health	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.	https://www.modernhealth.com
Paylocity	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.	https://www.paylocity.com

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Vendor Name	Contact Info:	Solution	Website
Pharm to Table	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.	https://pharmtotable.life
QBE	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.	https://www.qbe.com
Quantum Health	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.	https://quantum-health.com/
Ryan Specialty Benefits	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 as well as single parent and group captives.	https://rsbenefits.com
Spring Health	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.	https://www.springhealth.com
Surest	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.	https://www.surest.com/
Teladoc	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.	http://www.teladochealth.com/
TriNet	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.	https://www.trinet.com .
Unum	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.	https://www.unum.com/
Zomo Health	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).	https://www.zomohealth.com

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Contact Us:

Vince Giacalone

President, Employee Benefits

614.407.7515 | Vince.Giacalone@usi.com





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For Attending
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Symposium