



WELCOME TO USI'S HEALTH BENEFITS INNOVATION SYMPOSIUM

August 20, 2026
8 AM – 6 PM

Marriott Long Beach Downtown
111 E Ocean Blvd
Long Beach, California 90802



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Hello & Welcome!

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

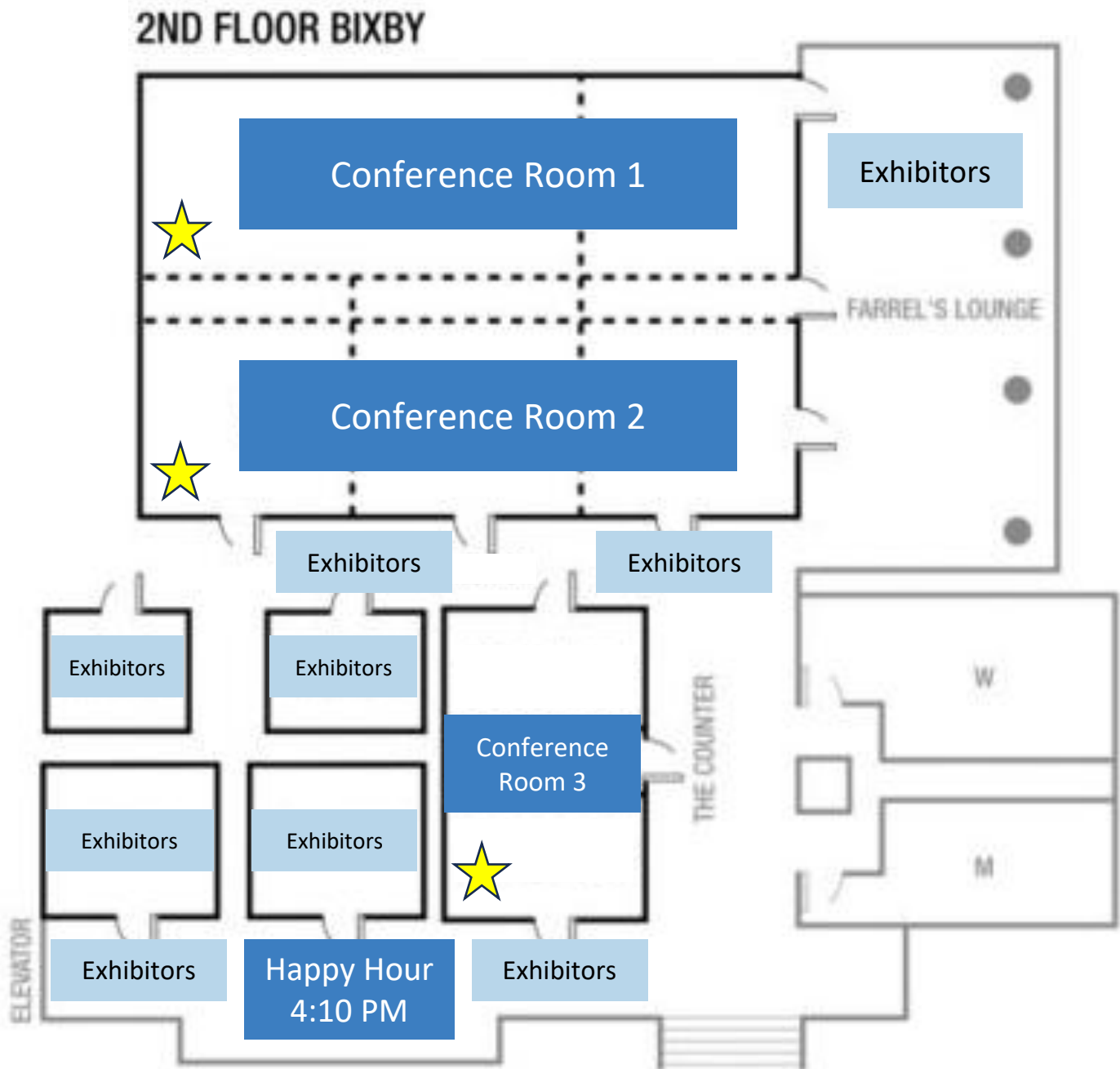
We'll take a deeper dive into the types of solutions we have found to produce a positive impact on the populations of our client partners. We hope this opens your eyes to the wide variety of solutions that can be offered to your workforce.

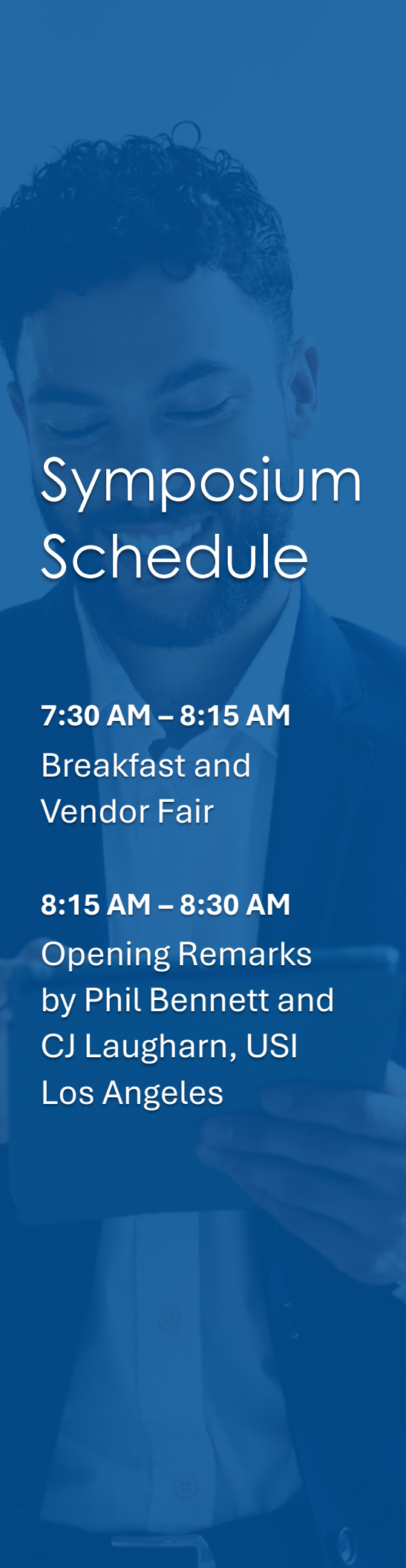
If you have any questions or concerns throughout the Symposium, please do not hesitate to reach out to a member of the USI team. We hope you leave today feeling energized and empowered, both personally and professionally.

Best of Health,

Your Los Angeles Employee Benefits Team at USI

Innovation Symposium Map





Symposium Schedule

7:30 AM – 8:15 AM

Breakfast and
Vendor Fair

8:15 AM – 8:30 AM

Opening Remarks
by Phil Bennett and
CJ Laugharn, USI
Los Angeles

Breakout Session 1

Attend 1 of the breakout sessions below

8:30 AM – 9:05 AM

Conference Room 1: Surest – *Reducing Healthcare Costs While Elevating the Member Experience*

Conference Room 2: Judi Health – *Medical and Pharmacy Claims Processing Finally Available on a Single Platform*

Conference Room 3: Nonstop Health – *Where Financial Stability Meets Human Care*

Intermission | Vendor Fair

9:05 AM – 9:20 AM

Breakout Session 2

Attend 1 of the breakout sessions below

9:20 AM – 9:55 AM

Conference Room 1: FEDlogic – *Helping Navigate Federal & State Benefits*

Conference Room 2: Abacus Health Solutions – *Enriching Benefits & Improving Outcomes: Leveraging Pharmacy-Based Incentives in Diabetes and Obesity Care*

Conference Room 3: Norton LifeLock – *The Current Cybersecurity Landscape and How to Stay Protected*

Intermission | Vendor Fair

9:55 AM – 10:10 AM



Symposium Schedule

Breakout Session 3

Attend 1 of the breakout sessions below

10:10 AM – 10:45 AM

Conference Room 1: MapperHealth and Mayo Clinic – *Precision Health, Proven Savings: How Mayo Clinic DNA-Guided Insights Deliver Clinical Excellence and 8.5x–13x ROI*

Conference Room 2: Stealth Partner Group – *How To Position Self-Funding*

Conference Room 3: SureCo – *The Championship Assist: Advanced ICHRA Strategies for a Winning Team*

Intermission | Vendor Fair

10:45 AM – 11:00 AM

Breakout Session 4

Attend 1 of the breakout sessions below

11:00 AM – 11:35 AM

Conference Room 1: Medefy – *What the Fox Happened? And How Are We Going to Fix It? A Story About Healthcare Costs, the Benefits Maze, and a Better Way Forward*

Conference Room 2: Benecon – *Stop Loss Consortium Guaranteed Renewable with Rate Caps, No New Lasers and No Re-Underwriting – Ever*

Conference Room 3: InComm Benefits – *The HSA Experience Gap: What Employees Really Need From Their Benefits*

Lunch Break

Complimentary lunch provided to all attendees

11:35 AM – 12:30 PM



Symposium Schedule

Breakout Session 5

Attend 1 of the breakout sessions below

12:30 PM – 1:05 PM

Conference Room 1: Garner Health – *How Employees Get Better Care at No Out-of-Pocket Cost While Employers Save*

Conference Room 2: Meritain Health – *Key Cost Drivers To Support Better Affordability, Access and Quality of Care*

Conference Room 3: The Difference Card – *Alternative Funding Strategies*

Intermission | Vendor Fair

1:05 PM – 1:20 PM

Breakout Session 6

Attend 1 of the breakout sessions below

1:20 PM – 1:55 PM

Conference Room 1: WEX – *HSA vs. FSA: See How You'll Save With Each*

Conference Room 2: ClaimDOC – *Reference Based Pricing (RBP) plans that save 25%-30% vs. traditional plans*

Conference Room 3: Dimensional Fund Advisors – *Economic Trends, Drivers of Investment Outcomes, and Fiduciary Considerations Impacting Benefits Plans*

Intermission | Vendor Fair

1:55 PM – 2:10 PM



Symposium Schedule

Breakout Session 7

Attend 1 of the breakout sessions below

2:10 PM – 2:45 PM

Conference Room 1: Chubb – *Bend the Trend in Your Medical Spend: An Innovative Strategy to Help Manage Rising Healthcare Costs*

Conference Room 2: USI Insurance Services

Conference Room 3: Snell & Wilmer with USI Consultants Sara Park and Sylvia Joo Mierzwiak – *Navigating the Bermuda Triangle of FMLA, ADA, and Work Comp Responsibilities*

Intermission | Vendor Fair

2:45 PM – 3:00 PM

Breakout Session 8

Attend 1 of the breakout sessions below

3:00 PM – 3:35 PM

Conference Room 1: Kaiser Permanente – *Healthcare Affordability And Improved Healthcare Outcomes Through Vertical Integration*

Conference Room 2: Allied Benefit Systems – *The Future of Third Party Administration for All Employers: Stability, Flexibility, and Cost Control*

Conference Room 3: Remodel Health – *Beyond the Renewal Hike: A Data-Driven Look at ICHRA for California Employers*

Intermission | Vendor Fair

3:35 PM – 3:50 PM



Symposium Schedule

Breakout Session 9

Attend 1 of the breakout sessions below

3:50 PM – 4:10 PM

Conference Room 1: USI Consulting Actuary Alicia Taylor, ASA, MAAA – *Beyond Fully Insured: Evaluating Health Benefit Funding Strategies*

Conference Room 2: USI Pharmacy Consultant Jess Williams, CPhT – *Pharmacy Benefits 2026: New Strategies to Manage High-Cost Drugs*

Conference Room 3: Clifton Larson Allen – *Auditing Your Employee Benefits Plan*

Happy Hour

Complimentary happy hour for all attendees

4:10 PM – 6:00 PM

Meet Our Speakers

Opening Remarks – Conference Room 1



Phil Bennett
Partner and VP,
Employee Benefits
[LinkedIn](#)



CJ Laugharn
Employee Benefits
Practice Leader
[LinkedIn](#)

USI Insurance Services

Phil has worked in employee benefits and HR since 2013 both as a business owner and broker. With expertise in logistics, manufacturing and foods industries, Phil helps employers implement creative strategies to lower the cost of employee benefits and improve employee health insurance programs.

CJ has more than 20 years of experience in the employee benefits industry and serves as USI's Los Angeles Employee Benefits Practice Leader. He partners with organizations to develop effective employee benefits strategies and workforce solutions.

Breakout Session 1 – Conference Room 1



John Chabot
Vice President
of Sales
[LinkedIn](#)

Surest

Reducing Healthcare Costs While Elevating the Member Experience

This session showcases how Surest is redefining employer sponsored health benefits by delivering meaningful cost savings alongside a significantly improved member experience. Through transparent pricing, simplified plan design, and proactive engagement tools, Surest empowers employees to make more informed healthcare decisions while helping employers better control spend. Attendees will learn how the Surest model differentiates from traditional plans and supports the UnitedHealth Group mission “To help people live healthier lives and to help make the health system work better for everyone.”

Meet Our Speakers

Breakout Session 1 – Conference Room 2



Brian TenEyck
VP Consultant
Relations & Business
Development
[LinkedIn](#)



Mike Tate
VP, National Business
Development
[LinkedIn](#)

Judi Health

Medical and Pharmacy Claims Processing Finally Available on a Single Platform

In this session, the team from Judi Health will explain how they are changing the way that healthcare administration and benefits are delivered to employers and members using the Judi platform. By bringing together administration of medical and Rx benefits on a unified platform, Judi Health improves the key elements facing employers today resulting in better service, better data, and better outcomes. We will share with attendees our approach to total healthcare administration using a combination of technology and people to give our clients the infrastructure they need to receive the healthcare they deserve.

Meet Our Speakers

Breakout Session 1 – Conference Room 3



Lesley Brown Albright
Senior Director of
Business Development
[LinkedIn](#)



Lori Hubler
Senior Director of Sales
[LinkedIn](#)

Nonstop Health

Where Financial Stability Meets Human Care

Gain clarity on why top-tier employers are moving toward alternative funding models to regain true control over their healthcare strategy and long-term spend.

Unlock the human value of Nonstop's first-dollar Medical Expense Reimbursement Plan (MERP); a powerful tool that demonstrates a lasting commitment to your employees' well-being while simultaneously protecting your organization's bottom line.

See it in action: Don't take it from us, see Nonstop by the numbers and hear real a human impact story.

Meet Our Speakers

Breakout Session 2 – Conference Room 1



Max Osbun
EVP, Client Success
and Development
[LinkedIn](#)

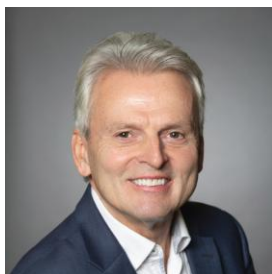
[FEDlogic](#)

Helping Navigate Federal & State Benefits

Many employees are eligible for valuable federal and state benefit programs, but don't know where to start. The result? Missed opportunities, unnecessary financial stress, and higher healthcare costs.

I'll discuss how employers can make a meaningful difference by helping employees navigate Medicare, Medicaid, Social Security Disability, and other federal and state benefit programs. Discover how education and better benefit navigation can improve employee well-being, increase healthcare affordability, and strengthen your overall benefits strategy.

Breakout Session 2 – Conference Room 2



David K. Ahern, PhD
Co-Founder and
Chief Science
Officer
[LinkedIn](#)

[Abacus Health Solutions](#)

Enriching Benefits & Improving Outcomes: Leveraging Pharmacy-Based Incentives in Diabetes and Obesity Care

Join Dr. David K. Ahern for a discussion about behavior-based diabetes and obesity care. With a foundation in behavioral science and proven results, Abacus combines patented pharmacy incentives with high-touch clinical support and personalized coaching to drive sustained engagement and measurable outcomes. This session explores how pharmacy-based incentives can serve as a powerful lever in diabetes and obesity care. Abacus programs remove cost barriers, improve medication adherence, and create lasting behavior change. Practical strategies and real-world results will be included to help organizations enrich benefits while improving member health.

Meet Our Speakers

Breakout Session 2 – Conference Room 3



Cameron Moore
Regional Sales
Director - West
[LinkedIn](#)

[Norton LifeLock](#)

The Current Cybersecurity Landscape and How to Stay Protected

Cyberthreats are evolving faster than ever, making personal data management a growing priority for employees and their families. AI-driven scams, deepfake fraud, and large-scale data breaches are increasing both the frequency and impact of cybercrime, leaving traditional identity protection struggling to keep pace.

This session explores today's rapidly changing threat landscape, including emerging attack tactics and the financial and emotional consequences for victims. It also examines what these trends mean for the workforces your clients trust you to protect and highlights the key features employers should look for in a modern benefit solution.

The session concludes by demonstrating how Norton LifeLock Benefit Solutions helps address these risks while creating a clear, compelling value proposition. Attendees will leave with the insights, statistics, and tools needed to help employers stay ahead and support their employees' digital peace of mind.

Meet Our Speakers

Breakout Session 3 – Conference Room 1



Dr. Chris Grilli
Co-Founder and
Associate Director
[LinkedIn](#)

[MapperHealth](#) | [Mayo Clinic](#)

Precision Health, Proven Savings: How Mayo Clinic DNA-Guided Insights Deliver Clinical Excellence and 8.5x–13x ROI

Join Dr. Chris Grilli, Associate Director of the Mayo Clinic Genomic Health Lab and Co-founder of MapperHealth, for an exclusive look at how genomic precision is transforming employee benefit strategies. Developed in collaboration with Mayo Clinic, MapperHealth's DNA-guided platform replaces clinical guesswork with proactive health management, predicting major health risks up to a decade in advance and pinpointing the most effective medications for each individual. For brokers and employers, this high-impact strategy presents an unprecedented opportunity to eliminate wasteful healthcare spending, deliver a 8.5x to 13x ROI, better manage plan risk, and deliver life-changing outcomes for employees.

Breakout Session 3 – Conference Room 2



Scott Campbell
Executive Vice
President
[LinkedIn](#)

[Stealth Partner Group](#)

How To Position Self-Funding

Scott Campbell will be walking through the fundamentals of stop loss structure, contract provisions, and market dynamics — including the growing case against fully insured arrangements. From there, it explores the spectrum of cost containment strategies and innovative product solutions such as Reference-Based Pricing, specialty pharmacy management, and Gene Therapy guarantees. The final section provides a deep dive into captive structures, explaining how they work, the financial mechanics involved, and how to evaluate whether a captive is the right fit for a given client.

Meet Our Speakers

Breakout Session 3 – Conference Room 3



Matt Christopherson
Co-Founder
[LinkedIn](#)



Robert Horry
Chief Impact Officer
[LinkedIn](#)



Erik Wissig
Chief Operations Officer
[LinkedIn](#)



Tash Fericelli
Regional Sales Director
[LinkedIn](#)

[SureCo](#)

The Championship Assist: Advanced ICHRA Strategies for a Winning Team

Move beyond the fundamentals of ICHRA and discover what it takes to build a championship-caliber benefits strategy. Join 7-time NBA Champion Robert Horry alongside benefits innovators Matt Christopherson and Erik Wissig as they explore how employers, consultants, and administrators work together to drive better outcomes, avoid common pitfalls, and turn ICHRA into a true competitive advantage. Every championship team needs an assist. Learn how the right partnership can become yours.

In this session, you'll walk away knowing:

- Which organizations are a slam-dunk for ICHRA
- What questions to ask before making the switch
- Why a team approach to your ICHRA strategy is essential for its success
- How to navigate ICHRA compliance regulations
- And so much more!

Meet Our Speakers

Breakout Session 4 – Conference Room 1



Erica Hines
Head of Strategic
Alliances &
Partnerships
[LinkedIn](#)

[Medefy](#)

What the Fox Happened? And How Are We Going to Fix It? A Story About Healthcare Costs, the Benefits Maze, and a Better Way Forward

For over two decades, Erica has led national health initiatives, product innovation, and strategic partnerships across workplace well-being, employer benefits, and digital health.

As Head of Strategic Alliances & Partnerships at Medefy, Erica brings a research-driven, human-centered perspective to making healthcare easier to navigate and benefits more effective. She holds an MS in Health Promotion with a specialization in Human Resource Management, is a Certified Worksite Wellness Program Consultant, and holds a certification in AI Product Management.

Breakout Session 4 – Conference Room 2



Brad Kopcha
Executive Vice
President of
Actuarial Services
and Corporate
Development
[LinkedIn](#)

[Benecon](#)

Stop Loss Consortium Guaranteed Renewable with Rate Caps, No New Lasers and No Re-Underwriting – Ever

Brad Kopcha is the Executive Vice President of Actuarial Services and Corporate Development at Benecon and a seasoned health actuary with over 25 years of experience across both consulting firms and insurance carriers. For the past 11 years, he has played a key leadership role at Benecon, guiding strategic growth initiatives and bringing deep actuarial expertise to the development of health insurance rates in both self-funded and fully insured environments. Brad is a Fellow of the Society of Actuaries (FSA), Fellow of the Conference of Consulting Actuaries (FCA) and a Member of the American Academy of Actuaries (MAAA).

Meet Our Speakers

Breakout Session 4 – Conference Room 3



Pat Chorpenning, Jr.
Regional VP of Sales,
Western US
[LinkedIn](#)

InComm Benefits

The HSA Experience Gap: What Employees Really Need From Their Benefits

Pat joined InComm Benefits in August 2024 and is currently leading InComm's go-to-market sales efforts for the western U.S.

What keeps employees from getting the full value of their HSA? Research from more than 1,200 HSA users reveals a persistent gap between having an HSA and confidently using it.

This session will explore where employees experience the most friction—from understanding eligible expenses and navigating mixed purchases to managing out-of-pocket costs and reimbursements. We'll unpack the research and discuss practical ways employers can simplify the HSA experience, reduce confusion, and help employees use their benefits with greater confidence.

Meet Our Speakers

Breakout Session 5 – Conference Room 1



Troy Parant
Vice President
of Sales
[LinkedIn](#)

[Garner Health](#)

How Employees Get Better Care at No Out-of-Pocket Cost While Employers Save

Please join us to discuss strategies for reducing healthcare spending while significantly improving benefits for employees. In this session, you'll learn how a simple, non-disruptive plan addition steers members to the best-performing doctors in your existing network - giving employees access to the best care at no out-of-pocket cost, in a solution where Finance wins, HR wins, and members win. Applicable to fully insured, level funded, and self-funded employers with 50+ enrolled.

Breakout Session 5 – Conference Room 2



[Meritain Health](#)

Key Cost Drivers To Support Better Affordability, Access and Quality of Care

Self-funding strategies for organizations of all sizes including traditional self-funding, captive arrangements, navigation and advocacy solutions and alternative health plans.

[LinkedIn](#)

Meet Our Speakers

Breakout Session 5 – Conference Room 3



Adrien Darbouze Jr.
West Coast
Market Director
[LinkedIn](#)

The Difference Card

Alternative Funding Strategies

Adrien will be discussing a creative way to reduce an organization's healthcare spend without reducing employee benefits or increasing employee contributions. Medical Expense Reimbursement Plans offer a way to mitigate fixed costs and reduce carrier premiums while maintaining a group's same coverage amounts.

Meet Our Speakers

Breakout Session 6 – Conference Room 1



Sanjib Sengupta
Vice President,
Health & Benefits
Engineering
[LinkedIn](#)

WEX

HSA vs. FSA: See How You'll Save With Each

Sanjib Sengupta is the VP of Health & Benefits Engineering at WEX. He leads the engineering teams building and scaling the next generation of WEX's Consumer Driven Health technology.

We power your benefits so you can move your business — and your people behind it — forward. WEX turns benefits complexity into clarity.

Breakout Session 6 – Conference Room 2



Jeff Dooley
VP of Business
Development
[LinkedIn](#)

ClaimDOC

Reference Based Pricing (RBP) plans that save 25%-30% vs. traditional plans

Jeff Dooley is the VP of Business Development for ClaimDOC, with over 30 years of industry experience and expertise.

ClaimDOC is a national medical claim auditing and member advocacy company driven to help employers deliver successful and sustainable medical plans for their employees. Using reference-based pricing principles, our clients save an average of 30% off their healthcare spend within the first year of switching to ClaimDOC. ClaimDOC leverages Pave the Way™, a premium member concierge to ensure access and prevent noise, while consistently maintaining a 360° View of Risk™ as co-fiduciary. Using next-generation technology paired with a human touch makes ClaimDOC the most effective and sustainable alternative in the industry.

Meet Our Speakers

Breakout Session 6 – Conference Room 3



David Campbell
Vice President and
Regional Director
[LinkedIn](#)



Matt Lipps
Investment Strategist
[LinkedIn](#)

Dimensional Fund Advisors

Economic Trends, Drivers of Investment Outcomes, and Fiduciary Considerations Impacting Benefits Plans

As Vice President and Regional Director, David Campbell partners with financial advisors in the retirement space to provide education and training regarding capital markets research and Dimensional's investment strategies. In addition, he provides thought leadership, investment communication strategies, portfolio construction analysis, and practice management insights to support advisors in delivering an exceptional client experience.

Previously, David was a Managing Director for Charles Schwab where he worked exclusively with advisors and consultants in the qualified plan space. He earned a bachelor's degree in finance from the University of Texas at Austin and also graduated with honors from the Cannon Financial Institute Trust School at the University of Notre Dame. He is a Certified Financial Planner (CFP), a Certified Pension Consultant (CPC) and member of the American Society of Pension Professionals & Actuaries.

Matt Lipps is an Investment Strategist within Dimensional's Investment Solutions Group, which communicates Dimensional's investment philosophy and approach to clients and prospective clients. As a member of the Thought Leadership team, he conducts research and develops educational content on a wide range of investment topics. Matt also regularly speaks at Dimensional and industry events, providing insights on financial markets and investment-related issues.

Before joining Dimensional, Matt worked in sponsor finance at Zions Bank in Salt Lake City, Utah. He earned an MBA from the BYU Marriott School of Business and is a CFA® charterholder.

Meet Our Speakers

Breakout Session 7 – Conference Room 1



Rob Hare
President
[LinkedIn](#)

Chubb

Bend the Trend in Your Medical Spend: An Innovative Strategy to Help Manage Rising Healthcare Costs

Rob Hare brings over 25 years of experience in the benefits space and is widely recognized for reshaping how organizations approach healthcare risk. His proactive, education-driven strategies help employers manage costs while supporting employees with coverage that fits their needs.

He applies a modern solution to the long-standing challenge of rising healthcare expenses, delivering measurable value to both organizations and the people they serve. Known for his strategic implementation expertise and collaborative leadership, Rob guides companies through meaningful benefits transformation with confidence and clarity.

Breakout Session 7 – Conference Room 2



USI Insurance Services

[LinkedIn](#)

Meet Our Speakers

Breakout Session 7 – Conference Room 3



Jason Yu
Snell & Wilmer
Commercial Litigation
and Employment Attorney
[LinkedIn](#)



Sara Park
USI Insurance Services
Regional Claims Manager
[LinkedIn](#)



Sylvia Joo Mierzwiak
USI Insurance Services
Employee Benefits Counsel
[LinkedIn](#)

Snell & Wilmer | USI Insurance Services

Navigating the Bermuda Triangle of FMLA, ADA, and Work Comp Responsibilities

Jason Yu is a Commercial Litigation and Employment partner at Snell & Wilmer in Los Angeles. His practice focuses on employment litigation, investigations, and trials, with extensive experience representing employers across a variety of industries. He has litigated matters in state and federal courts throughout his career.

Sara Park is a Regional Claims Manager with USI Insurance Services and brings more than a decade of claims consulting experience. She assists clients with complex and litigated claims, loss mitigation strategies, benchmarking, and claims program optimization.

Sylvia Joo Mierzwiak is an Employee Benefits Counsel with USI Insurance Services. She advises clients on healthcare reform, ERISA, plan administration, and employee benefits compliance. Prior to joining USI, Sylvia practiced in compliance and ERISA litigation roles and is licensed to practice law in California.

Meet Our Speakers

Breakout Session 8 – Conference Room 1



Afif El-Hasan, MD
Pediatrician
[LinkedIn](#)

Kaiser Permanente

Healthcare Affordability and Improved Healthcare Outcomes Through Vertical Integration

Dr. Afif El-Hasan is a pediatrician with Kaiser Permanente in Orange County, California. He has been an active member of the organization's Asthma Care Management Team for more than 13 years, which strives to optimize the care of thousands of patients living with asthma. He also serves on the Culturally Responsive Care Committee for Kaiser Permanente in addressing the cultural/linguistic aspects of patient care.

Breakout Session 8 – Conference Room 2



Nick Buratti
Regional Vice
President, West
[LinkedIn](#)

Allied Benefit Systems

The Future of Third Party Administration for All Employers: Stability, Flexibility, and Cost Control

Today's benefits market is under significant pressure. Employers are facing rising large-claim costs, double-digit renewal increases, and growing frustration with traditional carrier models that often leave them feeling trapped with limited flexibility. As a result, broker-of-record changes are accelerating as employers search for alternatives that can deliver greater control and long-term stability.

In this session, I'll discuss how Allied Benefit Systems is helping employers navigate these challenges through a more flexible and independent TPA model. This discussion will highlight how employers can stop relying solely on network discounts and instead create a comprehensive strategy that improves outcomes, controls costs, and achieves long-term plan stability.

Meet Our Speakers

Breakout Session 8 – Conference Room 3



TJ Witham
VP, Broker Sales
[LinkedIn](#)

[Remodel Health](#)

Beyond the Renewal Hike: A Data-Driven Look at ICHRA for California Employers

As healthcare costs continue to climb, California employers are facing the same question every renewal season: how do we offer competitive, quality benefits without unpredictable cost swings?

In this session, Remodel Health introduces Individual Coverage HRAs (ICHRAs), a benefits strategy that's moving from niche to mainstream nationally and gaining particular traction in California, where the individual insurance market has shown notable rate stability over the past several years. Attendees will see current CMS enrollment data, Remodel Health's 2026 ICHRA Report findings, and California-specific market trends, then explore how ICHRA works, what it means for both employer budgets and employee plan choice, and how to evaluate whether it's the right fit for their organization.

Whether you're actively exploring alternatives to traditional group coverage or simply want to understand where the market is heading, you'll leave with a clear, data-backed picture of what ICHRA offers, and what to consider before making a change.

Meet Our Speakers

Breakout Session 9 – Conference Room 1



Alicia Taylor,
ASA, MAAA
Consulting Actuary
[LinkedIn](#)

[USI Insurance Services](#)

Beyond Fully Insured: Evaluating Health Benefit Funding Strategies

Alicia Taylor helps employers navigate rising healthcare costs by evaluating funding strategies, quantifying financial risk, and turning complex data into actionable insights. As an Associate of the Society of Actuaries (ASA) and Member of the American Academy of Actuaries (MAAA), she advises organizations on the opportunities and trade-offs associated with alternative funding approaches. This session will explore how employers can evaluate health benefit funding strategies in a high-trend environment while balancing cost, risk, and financial flexibility.

Breakout Session 9 – Conference Room 2



Jess Williams, CPhT
Pharmacy Consultant
[LinkedIn](#)

[USI Insurance Services](#)

Pharmacy Benefits 2026: New Strategies to Manage High-Cost Drugs

As specialty medications, gene therapies, and GLP-1 treatments continue to drive pharmacy spend, employers face increasing pressure to balance cost management with member access and outcomes. This session will explore the most significant pharmacy benefit trends shaping 2026 and provide practical strategies for managing high-cost drugs. Attendees will gain insights into emerging market solutions, pharmacy benefit manager (PBM) contracting approaches, specialty drug management programs, and innovative cost-containment strategies that can help improve transparency, optimize plan performance, and deliver sustainable savings.

Meet Our Speakers

Breakout Session 9 – Conference Room 3



Vivian Cha
Tax Principal
[LinkedIn](#)



Michelle Su
Tax Manager
[LinkedIn](#)

Clifton Larson Allen

Auditing Your Employee Benefits Plan

Learn from a CPA employee benefit plan auditor with one of the largest accounting firms in the US about employee benefit plan audits and fiduciary responsibilities! Other Partners from the firm Clifton Larsen Allen (CLA) will also be reviewing FSA and HSA tax advantages for HR – from an accountant's perspective!

Thank You to Our Sponsors!





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