

FRENKEL BENEFITS

SEMINAR

Technological Innovation in Healthcare & Benefits

AGENDA		
9:00 - 9:30 am	BREAKFAST & REGISTRATION	Foyer
9:30 - 9:40 am	Welcome Craig Hasday	Broadway Ballroom
9:40 - 10:55 am	Q & A Panel with Technology Partners American Well: Telehealth bswift: Enrollment One Medical: Primary Care Truveris: Pharmacy Transparency WinFertility: Infertility Management Zest Health: Healthcare Transparency	Broadway Ballroom
10:55 - 11:10 am	1095 Reporting Adam Okun	Broadway Ballroom
11:10 - 11:20 am	BREAK	Foyer
11:20 - 11:35 am	Main Session Wrap-Up Craig Hasday	Broadway Ballroom
11:40 - 12:10 pm	Breakout Sessions 1	bswift
		One Medical
		WinFertility
12:15 - 12:45 pm	Breakout Sessions 2	Zest Health
		Truveris
		American Well
12:45 - 1:00 pm	Visit technology partners' tables in the foyer to get more information on their products and services.	Foyer



Craig Hasday, President of Frenkel Benefits & Senior Executive Vice President of Frenkel and Company



Craig is a nationally recognized healthcare leader, who has sat on the national advisory boards of Aetna, United Healthcare and Wellpoint, as well as the regional advisory boards of most major carriers. He sits on the Global and Domestic Benefit Advisory Boards of Assurex Global.

Craig is an appointee to Governor Cuomo's Regional Stakeholder Exchange Board, chair of the National Association of Health Underwriters (NAHU) Principals Council, and on the board of the NAHU Education Foundation.

Craig was selected as a 2015 Power Broker by Risk & Insurance Magazine, is a judge in the Business Insurance Benefit Manager of the Year awards, and is widely published and interviewed by media as a benefits expert.

Craig joined Frenkel in 1992, as the manager of what was then the Life & Employee Benefits department. Under his leadership, Frenkel Benefits has expanded almost twelvefold in revenue, now serving almost 800 clients across the U.S. and globally.

Craig is a member of the UnitedHealthcare Children's Foundation Regional Board of Directors as well as an adjunct professor at New York University. He is a New York State CPA, formerly working in the New York office of a big-four accounting firm. Craig has experience as an audit and tax professional, chief financial officer and a small business owner. This diverse background brings an in-depth appreciation for the challenges facing clients.



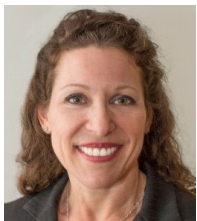


Adam Okun, ASA, MAAA, Executive Vice President of Frenkel Benefits

Adam Okun oversees compliance, financial reporting, and manages a number of the largest client relationships at Frenkel Benefits. Recently, he has received national recognition as an expert in the financial implications of the Affordable Care Act, presenting to some of the largest global firms in the legal and accounting industries on the compliance, administrative, and tax consequences of the legislation.

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Adam joined Frenkel after spending his early years at a national consulting firm, advising Fortune 500 clients on their health offerings and cost management strategies. He is an Associate of the Society of Actuaries (ASA) and Member of the American Academy of Actuaries (MAAA). Adam was on the Executive Committee of the Actuarial Society of Greater New York (ASNY) for four years and served as Acting Treasurer for two years. Adam is quoted frequently in business publications such as the Wall Street Journal, Bloomberg BNA and Law360.



Claudia Rimerman, Vice President

Claudia Rimerman has 25 years' experience launching new health care and insurance businesses, both within carrier platforms and as a consultant to insurers and healthcare ventures. Currently, Claudia serves as Vice President of Channel Relationships at American Well, the nation's leading telehealth platform. In this role, Claudia oversees American Well's distribution partnerships nationwide and across

American Well

the employer, health plan, and health system customer verticals. She is an enthusiastic advocate of a healthy lifestyle, including "real food" nutrition and enjoys sport climbing, Muay Thai, and running.



Don Garlitz, Senior Vice President

Don leads business development and carrier partner relationships for bswift's marketplace and contributes to the development of consumer-facing technology, including bswift's Ask Emma decision support tool. Don started as an insurance producer in 1997 and has held various sales, consulting, and management positions. Don also has significant legislative and regulatory experience and received a formal commendation from the Governor of Utah for

bswift

outstanding work as a consultant to the State. Don has a B.S. from Brigham Young University.



Jake Coniglio, Vice President, Sales

Jake Coniglio joined One Medical Group in 2014 as Vice President of the Enterprise Team, partnering with employers in New York and Los Angeles to make game-changing improvements to their health care benefits. Prior to One Medical, Jake spent over 10 years growing progressive health technology companies. Jake holds a bachelor's degree and an MBA from the University at Buffalo.

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AJ Loiacono, Co-Founder and Chief Innovation Officer

With over 20 years of experience in venture capital entrepreneurship and healthcare, AJ has led Truveris in product development, strategic planning, and enterprise partnerships since the company's inception in 2009.

TRUVERIS

AJ's previous experience includes the co-founder of SMS, where he established a joint venture with Realogy Holdings Corporation to develop a licensing management and real estate referral platform for realtors. He was also the President and co-founder at Victrix, which provides supply chain and consulting solutions for pharmaceutical manufacturers. AJ has served as a partner with Artemis Venture Capital. AJ holds a bachelor's degree in finance from Manhattanville College, as well as a degree in computer science from Tulane University.



Bernie Dal Cortivo, Senior Vice President, Sales & Marketing

With over 35 years' of healthcare experience, Bernie Dal Cortivo is currently Senior Vice President of Sales and Marketing at WINFertility. His responsibility includes all sales, marketing, and client management for both WIN's managed program for funded benefits, and their consumer program for voluntary/individual sales.

WINFertility
Hope. Believe. Conceive. Achieve.

Previously, Bernie has held multiple sales leadership positions within the ancillary insurance field. Bernie received his Bachelor of Science from University of New Hampshire, and his Master of Business Administration from Fairleigh Dickinson University.



Shawn Ellis, President

Shawn Ellis is the President of Zest Health. He supported the incubation of Zest Health in collaboration with the startup's two financial backers, 7wire Ventures and Lightbank. Since joining Zest Health full-time in 2013, he drove the company's commercial and organizational growth; today, the company has hundreds of thousands of contracted members.

ZEST HEALTH

Prior to Zest Health, Shawn focused on healthcare investments at 7wire Ventures. Shawn joined 7wire Ventures from the Boston Consulting Group, where he focused on strategy and corporate development topics in BCG's healthcare and financial services practice areas. Shawn holds an MBA from Northwestern's Kellogg School of Management and a BA in Economics from the University of Chicago.

UPCOMING FRENKEL BENEFITS' EVENTS

Thursday, July 28

HRA/HSA Compliance & Administration Issues

Register for all webinars at:

www.frenkelbenefits.com/events-and-webinars/

The results of the 2016 Mid-Market Employee Benefits Benchmarking Survey will be available in August. Contact your Frenkel Benefits account executive later this summer to go over the results.